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Montana

Tourism & Movie Locations Marketing Plan

July 1, 1990 - June 30, 1991

Montana Promotion Division
Department of Commerce
1424 9th Avenue
Helena, MT 59620
406-444-2654

Montana State Library
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Table of Contents

Introduction 1
Department of Commerce Organizational Structure 3
Travel Montana Functional Structure 4
Travel Montana Staff 5
Tourism Advisory Council Overview 8
Regional Tourism Organizations and Funded Convention and Visitors Bureaus . . 11
Tourism Funding 13
Travel Research 16

Travel Montana Marketing Plan

Consumer Advertising 19
Consumer Services 23
Consumer Exhibiting 25
Consumer Publications 26
National Publicity 29
Overseas Marketing 32
US/Canadian Group Travel 35
Industry Services 39
Tourism Infrastructure Development 42
Visitor Information Center Plan (HB 550) 43
Motion Picture, Television & Commercial Promotion 45
EZ 2 LUV Campaign 47

Travel Montana Marketing Calendar

Tourism Facts and Figures 48

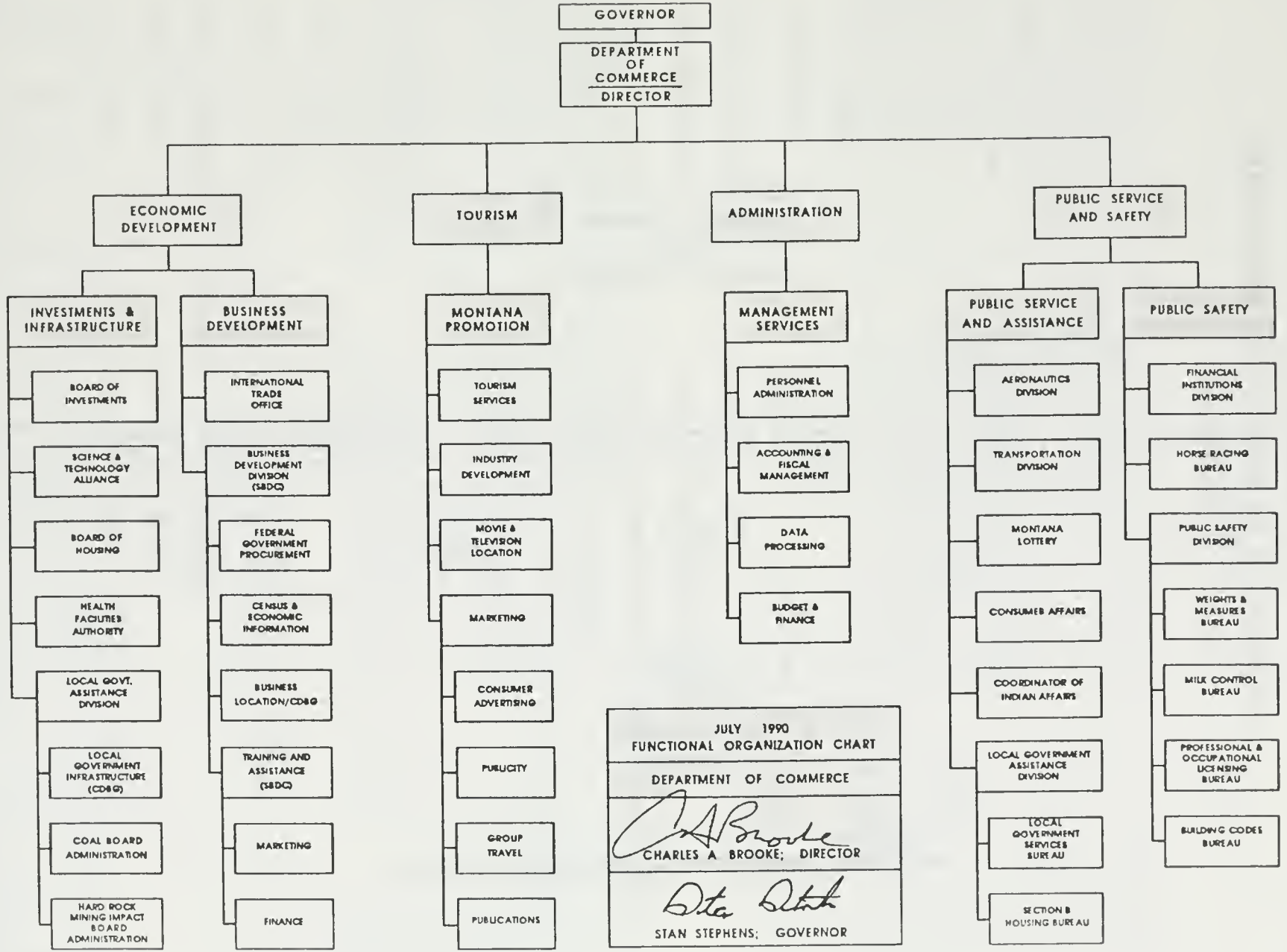
Introduction

This marketing workplan encompasses the proposed activities and strategies of the Montana Promotion Division of the Montana Department of Commerce for the period July 1, 1990 to June 30, 1991. The plan was developed as an economic development plan, under the guidance of the Montana Tourism Advisory Council.

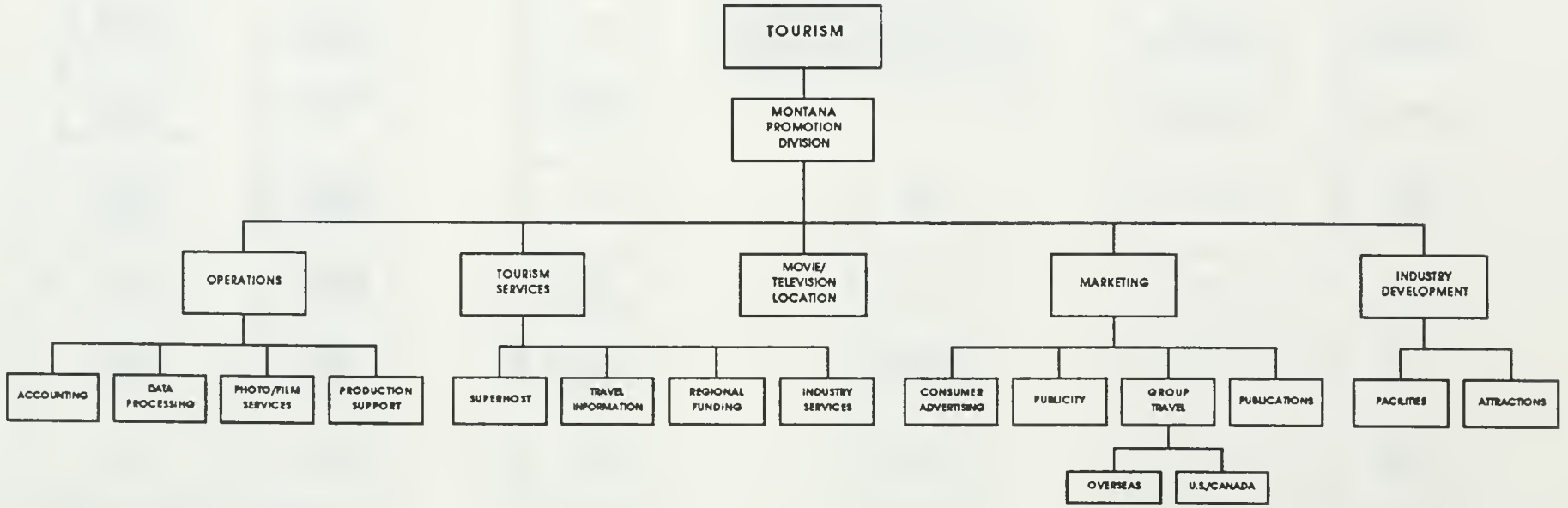
The plan is diverse, yet strategically targeted. It is designed to increase the number of visitors to Montana and their resultant expenditures, both in the short and long term. It is also designed to attract the filming of major motion pictures and television commercials to the state.

Twenty-five percent of the budget is legislatively allocated to the six tourism regions and eight qualifying convention and visitors bureaus (CVB's), as shown on page 8. These organizations are private, nonprofit corporations that market specific local regions and cities. Under the direction and guidance of the Tourism Advisory Council, these organizations submit annual marketing plans which seek to both increase visitation and visitors' length of stay. Marketing plans for each of the regions and CVB's are on file with the Montana Promotion Division (referred to in this document as Travel Montana).

Department of Commerce Organizational Structure



Travel Montana Functional Structure



FUNCTIONAL ORGANIZATION
TOURISM
DEPARTMENT OF COMMERCE
JULY - 1990

July, 1990
Montana Promotion Division
444-2654

Sandra Guedes	Travel Director

Marketing Staff

Gail Brockbank	Industry Services Manager
Karen Howard	International Group Travel Manager
Clint Blackwood	Infrastructure Development Coordinator
Lonie Stimac	Motion Picture & TV Location Manager
Mona Kolka	Public Relations Coordinator - Superhost, Instate Media
Nancy Korizek	Consumer Marketing Manager
Donnie Sexton	Publications Coordinator
Sandy Nicholls	Special Projects Coordinator
(Position Vacant)	Publicity Coordinator
(Position Vacant)	Motion Picture & TV Location Coordinator
(Position Vacant)	Group Travel Coordinator

Operations Staff

David Broussard	Operations Manager
Becky Thomas	Secretary
Sherryl Vaughn	Travel Counselor (slides, videos, publications)
Dane Steffensen	Travel Counselor
Kim Stevens	Travel Counselor
Don Reimer	Fulfillment/Mail Room Coordinator

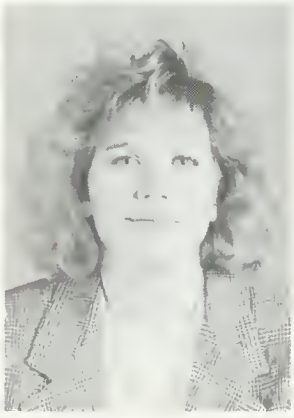
Meet the Travel Montana Staff

Sandra Guedes
Travel Director
Responsible for the direction of tourism and movie location efforts in Montana.

Don Reimer
Fulfillment Coordinator
Assures the mailing and distribution of hundreds of thousands of travel packets and documents annually.

Sherryl Vaughn
Travel Counselor
Provides "on the spot" travel counseling and assists the industry with photo needs.

David Broussard
Operations Manager
Directs telemarketing efforts for prompt fulfillment of inquiries and documents financial transactions of the Division.



Nancy Korizek
Consumer Marketing Manager
Identifies the target markets and designs aggressive campaigns which lure visitors to the state.

Donita Sexton
Publications Coordinator
Develops and produces publications which accurately portray the flavor of a Montana vacation.

Lonie Stimac
Movie Locations Manager
Works to obtain filming of movies and commercials in Montana and secure a Montana listing among credits.

Karen Howard
International Group
Travel Manager
Works to increase the number of overseas visitors arriving from the Pacific Rim and western Europe.

Meet the Travel Montana Staff

Kim Stevens
Travel Counselor
Provides "on the spot" travel counseling and assists with on-going interdepartmental projects.

Sandy Nicholls
Special Projects Coordinator
Performs diversified duties to accommodate specific needs for the entire division. Her involvement ranges from infrastructure development to national publicity.

Clint Blackwood
Infrastructure Development Coordinator
Coordinates efforts with other state/federal agencies on tourism-related issues and projects, and will work to provide technical assistance to the industry.

Mona Kolka
Public Relations Coordinator
Gives direction to Montana's hospitality training and distributes information to the Montana media and public about the state travel industry.

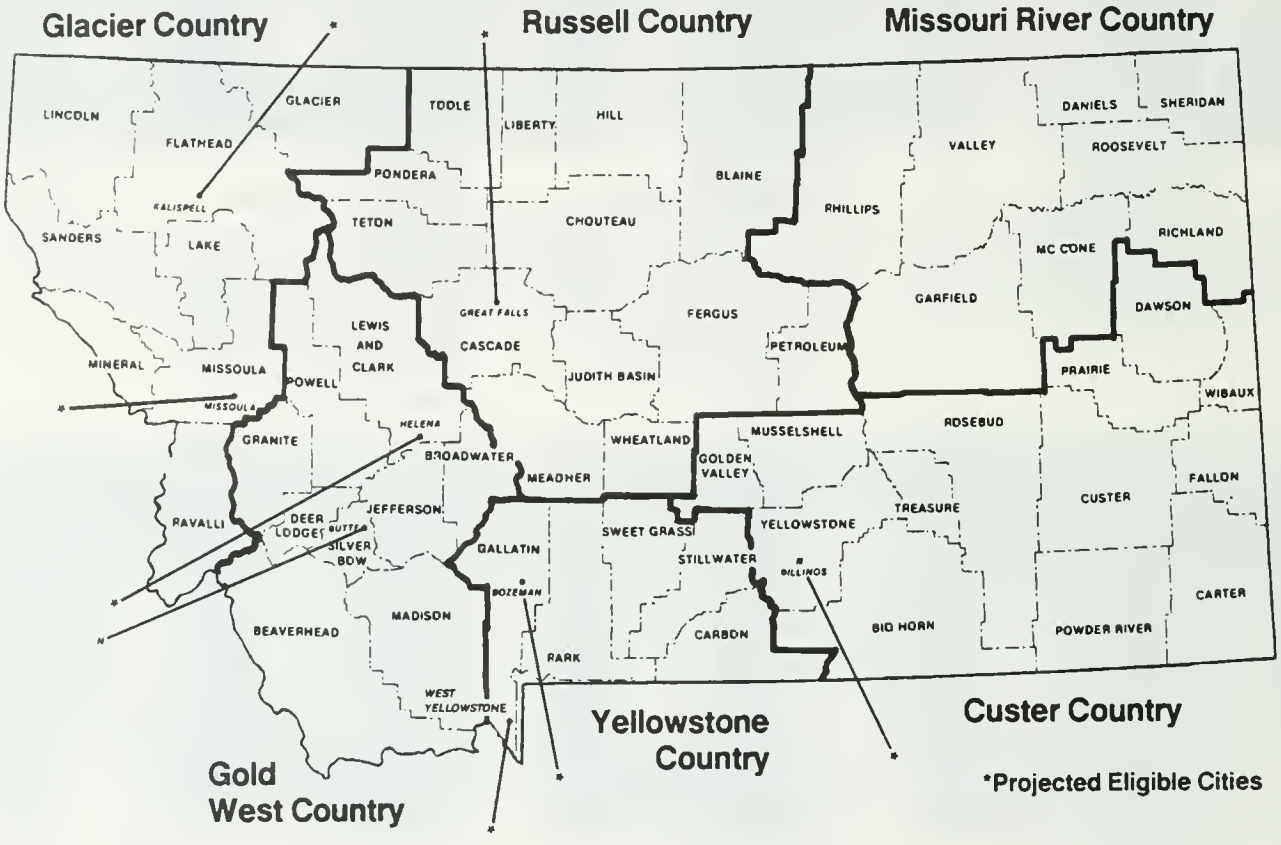
Becky Thomas
Secretary
Prepares endless typing and administrative details for the entire marketing staff.

Gail Brockbank
Industry Services Manager
Works with tourism organizations and the Tourism Advisory Council in distribution of tax revenues.

Montana

Tourism Advisory Council Overview

The Montana Tourism Advisory Council (TAC) has been in existence for several years, but was formerly created in statutes in July of 1987. The Council is composed of no less than 12 members appointed by the Governor from Montana's private sector travel industry, with representation from each of Montana's six tourism regions. Members of the Council shall serve staggered 3-year terms, subject to replacement at the discretion of the Governor.



A chairperson and a vice-chairperson are elected (or re-elected) during the first meeting of each fiscal year. Members must have served on the Council for at least one year in order to be eligible for election.

Roles of the Council:

-Advise the Governor on matters which relate to travel and tourism in Montana;

-Set policies and guide the efforts of Travel Montana, Department of Commerce;

-Oversee distribution of funds and set guidelines to regional nonprofit tourism corporations for tourism promotion and to nonprofit convention and visitors bureaus;

-Prescribe allowable administrative expenses for which accommodation tax proceeds may be used by regional nonprofit tourism corporations and nonprofit convention and visitors bureaus;

-Direct the university system regarding Montana travel research; approve all travel research programs prior to their being undertaken.

TAC Members:

Larry McRae, Chair (93)
Outlaw Inn
1701 Highway 93 South
Kalispell, MT 59901
755-6100
Innkeepers Association

Elmer Frame (91)
El-Mar KOA
3695 Tina Avenue
Missoula, MT 59801
549-0881
Campgrounds

Herb Leuprecht (91)
Butte Plaza Inn
2900 Harrison
Butte, MT 59701
494-3500
Member-at-Large

Taylor Middleton (91)
Big Sky Ski & Summer Resort
P.O. Box 1
Big Sky, MT 59716
995-4211
Yellowstone Country/Ski Areas

Alan Elliott (92)
Northern Hotel
1st & Broadway
Billings, MT 59101
245-5121
Member-at-Large

Henry Gehl (92)
Park Inn
211 East Main
Lewistown, MT 59457
538-8721
Russell Country

Edythe McCleary (92)
Custer Country
Route 1, Box 1206A
Hardin, MT 59034
665-1671
Custer Country

Arnold "Smoke" Elser (93)
Wilderness Outfitters
3800 Rattlesnake Drive
Missoula, MT 59802
549-2820
Outfitters & Guides

Barbara Moe (91)
Anderson-Elerding Travel
P.O. Box 2185
Great Falls, MT 59403
761-0700
Member-at-Large

Maureen Averill (92)
Flathead Lake Lodge
P.O. Box 248
Bigfork, MT 59911
837-4391
Member-at-Large

Diane Brandt (92)
Sam's Supper Club
307 Klein Avenue
Glasgow, MT 59230
228-4614
Missouri River Country

Greg Bryan (92)
Bay Point Estates
P.O. Box 35
Whitefish, MT 59937
862-2331
Glacier Country

Ken Hoovestol (93)
Century 21
3015 10th Avenue South
Great Falls, MT 59405
761-2811
Snowmobilers

Richard Krott (93)
Reeder's Alley
P.O. Box 572
Helena, MT 59624
449-7545
Gold West Country/Retailers

Ken Hickel (91)
Pondersoa Inn
P.O. Box 1791
Billings, MT 59101
259-5511
MT Chamber of Commerce

Al Donohue, Chair Emeritus
Best Western Heritage Inn
1700 Fox Farm Road
Great Falls, MT 59404

The number to the right of each name indicates the year in which that persons term will expire on July 1.

Regional Organization Contacts

October 1, 1990

GLACIER COUNTRY

Randy Gayner, President
Glacier Country
P.O. Box 535
West Glacier, MT 59936
888-5333

Joan Gentri, Exec. Dir.
Glacier Country
945 4th Avenue East, Suite B
Kalispell, MT 59901
756-7128 or 756-1575

GOLD WEST COUNTRY

John Claypool, President
Gold West Country
P.O. Box 988
Ennis, MT 59729
682-4933

Gail Jones
Gold West Country
1155 Main Street
Deer Lodge, MT 59722
846-1943

RUSSELL COUNTRY

John Carroll, President
Russell Country
P.O. Box 3166
Great Falls, MT 59403
727-7200

YELLOWSTONE COUNTRY

Tim Prather, President
Yellowstone Country
P.O. Box 750
Red Lodge, MT 59068
446-2610

Daryl Todd, Secretary
Yellowstone Country
P.O. Box 1392
Big Timber, MT 59011
932-4447

MISSOURI RIVER COUNTRY

Shirley Legg, President
Missouri River Country
P.O. Box 1064
Malta, MT 59538
654-1776

CUSTER COUNTRY

Sandra Hawke, President
Custer Country
P.O. Box 2514
Billings, MT 59103
256-2402

Edythe McCleary, Exec. Dir.
Custer Country
Route 1, Box 1206A
Hardin, MT 59034
665-1671

Convention & Visitors Bureau Contacts

October 1, 1990

BILLINGS

Maureen Steckman, Director
Billings Convention & Visitors Bureau
P.O. Box 31177
Billings, MT 59107
245-4111

BOZEMAN

Darla Joyner, Exec. V.P.
Bozeman Convention & Visitors Bureau
P.O. Box B
Bozeman, MT 59715
586-5421

Polly Stebbins
Bozeman Convention & Visitors Bureau
P.O. Box B
Bozeman, MT 59715
586-5421

BUTTE

Connie Kenney, Exec. V.P.
Butte-Silver Bow Chamber of Commerce
2950 Harrison Avenue
Butte, MT 59701
494-5595

GREAT FALLS

Mike Labriola, Exec. Dir.
Great Falls Chamber of Commerce
P.O. Box 2127
Great Falls, MT 59403
761-4434

HELENA

MaryEtta Voeller, Manager
Helena Convention & Visitors Bureau
201 East Lyndale
Helena, MT 59601
442-4120

KALISPELL

Nick Haren, Exec. Dir.
Kalispell Chamber of Commerce
15 Depot Loop
Kalispell, MT 59901
752-6166

MISSOULA

Pamela Hoedel, Director
Missoula Convention & Visitors Bureau
P.O. Box 7577
Missoula, MT 59807
543-6623

WEST YELLOWSTONE

Lorraine Stoops, President
West Yellowstone Chamber of Commerce
P.O. Box 458
West Yellowstone, MT 59758
646-7701

Tourism Funding

Montana's tourism promotion efforts are funded solely by the Montana lodging tax, which is a 4% tax on rates of hotels, motels, campgrounds, resorts and other lodging facilities.

1990/91 Tourism Budget (FY91)

August 2, 1990

Projected Lodging Tax Revenues	**$5,453,000**
Department of Revenue (Tax Collection and Enforcement)	$ 78,287
General Fund (Return of tax paid state employees)	$ 75,440
University System - 2.5% (Tourism & Recreation Research)	$ 136,325
Historical Society - 1% (Roadside Sites and Signage)	$ 54,530
Department of Commerce (Regions/CVB's and Travel Montana)	$5,108,418

	Projected FY91 Budget		FY90 Carryover		Total Projected FY91 Budget
Regions/CVB's (25%)	$1,277,104	+	$ 288,642	=	$1,565,746
Travel Montana(75%)	$3,831,313	+	$ 211,273	=	$4,042,586
	$5,108,417	**+**	**$ 499,915**	**=**	**$5,608,332**

Travel Montana - Projected FY91 Budget

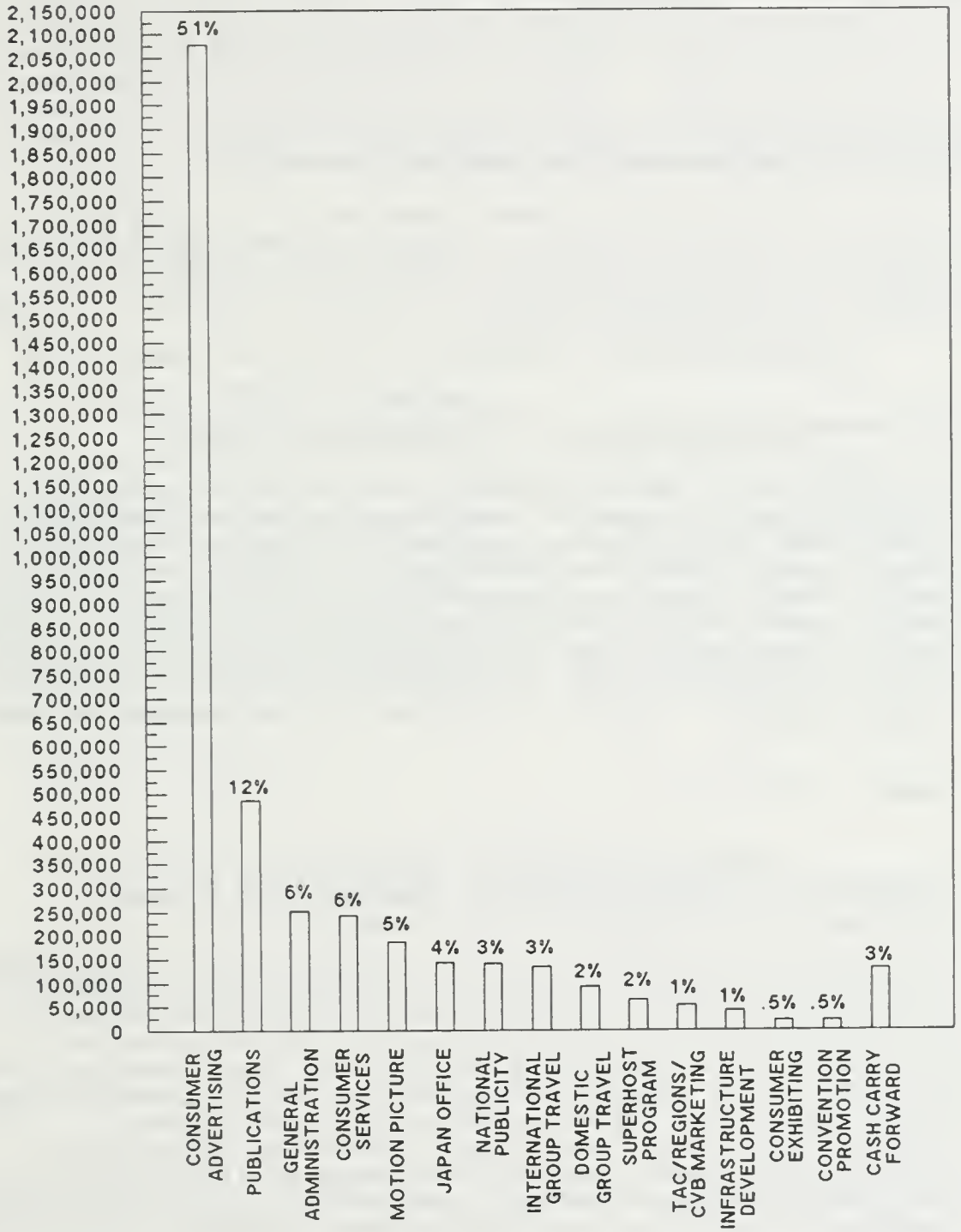
1.	General Administration	$ 252,175
2.	Consumer Marketing - Advertising	$2,084,775
	-Consumer Services	$ 240,000
3.	Consumer Exhibiting	$ 20,000
4.	Publications	$ 484,123
5.	National Publicity	$ 124,304
6.	Japan Office	$ 144,000
7.	Overseas Promotion	$ 165,368
8.	Domestic/Canadian Group Travel	$ 87,676
9.	Convention Promotion	$ 10,000 *
10.	Superhost & Instate Awareness Program	$ 48,443
11.	Infrastructure Development & Interagency Co-ops	$ 42,000
12.	Motion Picture & Television Location	$ 186,386
13.	Tourism Advisory Council and Administration of Regional/CVB Marketing	$ 53,336
14.	Cash Carry Forward (FY91)	$ 100,000
		$4,042,586

Estimated FY91 Revenues:	**$3,831,313**
Cash Carry Forward (FY90):	$ 211,273
Total Estimated FY90/91 Budget:	**$4,042,586**

*This is an arbitrary figure, pending TAC action.

August 1990

Montana Promotion Division
FY91 Projected Budget Allocation



Note: Each program includes its own operating costs; General Administration includes Travel Director and inhouse operations staff; Consumer Services budget includes postage, 800 lines and Telemarketing and mailing house staff.

Travel Research

Institute for Tourism and Recreation Research

The overall purpose of the planned research is to allow the recreation and tourism industry to make informed decisions about their industry's economic impact, development, planning, and marketing. The information generated from the research is designed to be relevant, practical and timely.

Economic Significance of Nonresident Travel

This study will sample visitors entering the state at all the highway locations used in the 1988/89 study of nonresident travellers, but will also include U.S. Highway 93 North and South, State Highway 200 West and East, and State Highway 16 North. The diary-questionnaire methodology used in the past will be continued to ensure comparability of data. The sampling at each location will be less intensive than in the previous study, and highways will be sampled only during the months of June-September. Downhill ski areas will be sampled in the winter as well.

Budget $55,000

Montana's Tourism Industry: Markets and Trends

This project will identify tourism region specific information, using data collected in previous studies. The project will also incorporate trends in national and international travel trends. The output of this project, which will be conducted on a continuing basis, will be a handbook and annual workshops that Montana tourism promotion agencies can use in promotion and marketing, and in informing interested agencies and organizations about the economic and social importance of tourism in Montana. Regional workshops similar in structure to the Economic Outlook seminars sponsored by the University of Montana Bureau of Business and Economic Research are envisioned.

Budget $10,100

Attitudes of Montanan's Toward Tourism Development

Two samples of Montana residents will be studied. The first sample will include a statewide sample representative of the population as a whole. The second sample will include those residing in tourism dependent communities because these individuals will most likely be those receiving the positive and negative consequences of tourism. A mail-return questionnaire procedure will be used. Results can assist the tourism industry in determining what tourism development issues need to be addressed, and how, so that negative impacts can be mitigated.

Budget $25,000

Recreation Activity Participation and Preferences of National Forest Campers

This study will involve personal interviews of groups camping in designated Forest Service campgrounds during the period Memorial Day - Labor Day 1990. Groups will be asked questions about motivations for camping and reasons for visiting Montana, as well as preferences for additional facilities and services. Currently, the School of Forestry, through a federal grant, is funding about half the cost of this project. The Forest Service is being asked to fund an additional one-quarter of the cost and the Tourism Advisory Council has approved funding for the remaining quarter.

Budget $10,000

Economic Impact of the Outfitting Industry

Relevant to the economic output of outfitting in Montana.

Budget $ 1,200

Visitor Information Center Study

The 1990 Legislature appropriated monies, two-thirds of which came from the Institute for Tourism & Recreation Research and one-third from the Department of Highways, for a proposed plan for Visitor Information Centers in the state. The proposal is to be presented to the 1991 Legislature. Please see page 43 for further explanation.

Budget $19,984

Preparation and implementation of gathered information pertaining to each of the above mentioned research studies.

Budget $23,716

Consumer Advertising

The consumer advertising program is designed to position Montana's vacation opportunities in the minds of consumers, ensuring that Montana will be considered as a potential vacation destination. This purpose is attained through the use of several means of paid advertising, often combined with other state and provincial travel offices and the private sector of Montana. Instate public service announcements are also widely used.

All advertising will be targeted toward consumers whom marketing studies and experience have shown to be most likely to visit Montana: people who either reside within a certain geographic area and fit a certain demographic profile, have special interests that draw them to Montana - or both.

Montana's Prime Geographic Markets:

Major Market Television (Spring/Summer)

Continue to use "Montana Sings" spot in established markets (Washington, Utah, Colorado, Minnesota, Nebraska, South Dakota) with expansion to new markets and special interest programming through cable.

The campaign will consist of 5 week flights in each market, averaging 1,100 gross rating points (GRP's) with schedules running mid-March through mid-May.

Summer Magazine Advertising

Make a strong impression in vertical markets through the use of special interest publications, such as "Trailer Life", "Fly Fisherman" and "Field & Stream." Possibly look for ways to develop partnerships with suitable manufacturers in order to increase the impact of the message. Create new Montana directory ad.

Continue to maximize advertising dollars through the Old West Trail, Montana/Wyoming and Montana/Alberta cooperative campaigns by targeting the high circulation travel-oriented and mass market publications, such as "Sunset", "Trailer Life" and "Travel Holiday."

Consider adding print advertising (magazines and/or newspapers) in select markets to support the television campaign.

"Invite-A-Friend to Montana"

Encourage Montanans to invite their friends and relatives to vacation in Montana, while reminding Montana residents of the vacation opportunities available to them within Montana. The campaign will be promoted instate through the use of television, radio, newspapers, coupons, and outdoor boards.

The campaign will be centered around the new "EZ 2 LUV" theme.

"Invite-A-Friend to Golf"

Encourage Montanans to invite their friends and relatives to golf in Montana, and use the opportunity to promote Montana's other attractions. Campaign promoted instate through coupons and point-of-purchase displays at golf courses statewide. Letter from the Governor encouraging golfers to Montana courses.

This campaign would be a joint venture between Travel Montana and the Montana golf courses.

"Invite-A-Friend to Fish"

Instate promotion encouraging Montanans to invite their out-of-state friends and relatives to fish in Montana, while using the opportunity to promote Montana's other attractions. In

conjunction with Fish, Wildlife and Parks, distribution points would be where fishing licenses are sold to instate anglers.

Fulfillment would be a cooperative effort between Fish, Wildlife & Parks and Travel Montana in producing a Montana Angling Guide.

Fall Advertising

Broaden Montana tourism season by building image of Montana as a prime fall vacation destination. The campaign would target two main audiences: 1) the family vacationers residing in nearby markets who tend to take more vacations of shorter duration and 2) people who are most likely to travel outside of the summer season, namely the "empty nesters" and RV travellers. Television and magazine will be used.

The television creative is modeled on the "Montana Sings" campaign and will target the nearby markets of Regina, Spokane, North Dakota and South Dakota. The creative from the 1990 season will be repeated with the addition of interested private sector participants.

Complementing the television ads, a magazine campaign featuring a 4-color, full-page ad will be placed in the following publications: New Choices, Family Motor Coaching, Trailblazer, Sunset, Highways, and Travel Holiday.

Downhill Ski Co-op

Maximize the marketing effort by concentrating the advertising dollars on national ski publications such as "Ski" and "Skiing" and selected markets within the target geography, with the goal of making a major impact in each one.

Production of new advertorial which will build upon the image of Montana as a top choice for ski vacations. Expand the number of private sector participants, while maintaining a clean, fresh look.

This multifaceted marketing campaign is a joint venture between Travel Montana, the Montana ski areas and the private sector (tourism countries and convention and visitor bureaus).

Nordic Ski Co-op

Reach cross country ski enthusiasts who travel in pursuit of the sport. Increase participation by Montana cross country ski areas, demonstrating the numerous possibilities Montana holds

for nordic skiers. Use of magazine advertising in popular nordic publications - Cross Country Skier, Nordic West and Silent Sports. Boost trackable inquiries through use of bind-in card and extension numbers on Travel Montana telephone number.

Create a full-page, four-color ad with advertorial listings for areas who choose to participate financially in the campaign.

This campaign is a joint effort between Travel Montana and the Montana Cross Country Ski Areas Association.

Snowmobiling Co-op

Reach snowmobilers who travel in pursuit of the sport by advertising in major snowmobile publications - "Snowmobile Magazine" and "Snowmobile West."

Create a full-page, four-color ad with advertorial listings for areas who choose to participate financially in the campaign.

This campaign is a joint effort between Travel Montana and Montana snowmobile businesses.

Saskatchewan Co-op

Travel Montana has approached the Saskatchewan Tourism office with the offer to join efforts to promote common attributes of our shared geographic region. The primary focus would be on cultural/heritage aspects, outdoor adventure and water recreation opportunities. One possibility is to maximize advertising dollars by targeting high circulation travel-oriented and mass market publications, pending the decision by the Saskatchewan Tourism office.

Sunbelt Campaign

Capitalize on the comfortable weather of Montana's summer season by targeting markets that experience exceptionally hot summer months. These "sunbelt" states include Texas, Arizona, and New Mexico, with specific focus in metropolitan/populated areas of each state.

The campaign would be promoted through the use of outdoor boards, radio and newspaper advertising. Accessibility by air would be emphasized and cooperation with an airline or corporate sponsor would be pursued.

Consumer Services

This function has a dual purpose: To provide consumers with much needed travel planning assistance and to produce and maintain accurate statistical data for the evaluation of the Division's advertising efforts.

Publications play an important part in the vacation decision-making process; postage and fulfillment labor costs will continue to eat a large portion of our consumer marketing efforts. Therefore, the aim of this area of Travel Montana is to make the process as cost effective as possible, by constantly streamlining operations and working creatively to reduce costs.

Travel Counseling & Inquiry Processing

Once Montana has been established as a potential vacation destination, it is necessary to provide prospective visitors with timely vacation planning information about the state.

The main reason for setting up the Deer Lodge Telemarketing Center was to improve customer service while keeping administrative costs to a minimum.

Travel Montana designed, purchased and maintains the computer and phone systems installed at the prison. Travel Montana sets the program guidelines and procedures, provides staff training and closely monitors all aspects of the operations, while the Prison provides screened inmates to staff the program and a civilian employee to supervise the operations.

Inquiry Fulfillment & Statistics

In order to provide consumers with the travel literature requested, it is necessary to have all pertinent information accurately recorded in the Division's computer. Following, address labels or letters of invitation are printed, sorted and ready to be attached to the appropriate materials for mailing. Our standards call for a time of no more than 48 hours.

Additionally, Travel Montana maintains a complete record of all travel requests, with specific information related to the date of request, origin of the inquiry and the operator who handled it. These statistics are used for quality control, as well as for use in conversion studies.

Travel Montana produces monthly statistical reports on the response generated by the various forms of consumer advertising, with a breakdown of phone versus written inquiries by month, season and specific publications/ads.

Travel Montana will handle approximately 400,000 requests for literature during this fiscal year.

Consumer Exhibiting

Travel Montana will participate in four consumer sport shows during the year, with market selection complementing magazine and/or television advertising. Participation will include Anaheim Sports & RV Show, To-Ro Sports Show in Seattle, Colorado RV & Adventure Travel Show in Denver and the Northwest Sportshow in Minneapolis.

This program provides an opportunity to provide persuasive, on-site travel counseling to potential travellers. Two booth areas will be rented at each show to provide adequate space to attractively display and distribute regional and state brochures. Negotiations are underway to increase Montana's exposure at additional shows through financial and staff support by Fish, Wildlife and Parks and the U.S. Forest Service.

In FY 91 Travel Montana will purchase a new booth identical to the one purchased during the past year for use in the double booth area.

Consumer Publications

Publications play an important part in the vacation planning process of travellers and often determine whether a potential visitor will choose Montana or another vacation destination. Accurate information must be provided in an attractive and reader friendly format that portrays the variety of activities and attractions available in Montana.

Montana Vacation Guide

40-page, four-color, glossy magazine that conveys high quality images of Montana, organizing the information by region to include history and attractions that help route visitors through our state (such as outlining the Lewis and Clark Trail). Print 500,000; available February 1991.

Montana Travel Planner

80-page directory of Montana accommodations encompassing motels/hotels, bed & breakfasts, guest ranches, resorts and campgrounds, plus listings of licensed outfitters, golf courses and information resources. Four-color cover, inside pages offset with spot color. Print 500,000; available February 1991.

Montana Highway Map

Four-color, folded, offset sheet that provides travellers with a detailed highway map, along with promotional imagery. Print 600,000; available January 1991.

Montana Winter Guide

36-page, four-color, glossy magazine that conveys a high quality image of Montana as a winter destination, plus specific information about downhill and nordic resorts, including accommodation listings for downhill areas, trip planning information and a winter calendar of events. Print 65,000; available September 1990.

Summer Calendar of Events

Self cover, saddle stitched booklet, that provides a statewide listing of events, May through October. Print 150,000; available April, 1991.

Winter Calendar of Events

Self cover, saddle stitched booklet, that provides a statewide listing of events, November through April. Print 7,000 (supplement to Winter and Snowmobiling Guides); available September, 1990.

Montana Snowmobiling Guide

32-page, four-color, glossy magazine conveying a high quality image of Montana as snowmobile and winter destination. Organized by tourism region to cross market other winter activities, events and attractions, the guide includes image and information about trail systems, trip planning information, lodging and service listings and information and map resources. A cooperative project with the Montana Department of Fish, Wildlife & Parks, the U.S. Forest Service and the Montana Snowmobile Association. Possible reprint. Quantity to be determined.

Montana Golf Guide

To be produced in cooperation with the state golf courses and associations (tentative). Quantity, format and publishing date to be determined.

Montana Angling Guide

To be produced in cooperation with the Department of Fish, Wildlife & Parks, the U.S. Forest Service and other interested parties (tentative). Quantity, format and publishing date to be determined.

Montana Historical Guide

To be produced in cooperation with the Montana Historical Society and the Museums Association of Montana (tentative). Quantity, format and publishing date to be determined.

National Publicity

Publicity is one of the most believable and effective types of exposure a travel destination can get. Exposure in national magazines and television shows provides the consumer with in-depth information that encourages them to visit new areas, explore new travel routes and try new activities. In 1990/91 key travel and news media -- both print and broadcast -- will be targeted in an effort to influence their editorial decisions. The 1990/91 publicity effort will focus much more on lesser known destinations, routes, seasons and activities.

Fresh Ideas From Montana

The newsletter is published quarterly, with three separate editions per quarter. It is distributed to magazines, producers and editors across the country. In 1990/91 we will take several actions to improve and streamline production of the newsletter, including enlarging the mailing list to include more media contacts and Montana free-lance writers. We will assign writing of articles to Montana free-lance writers and potentially work with the Journalism Department at Carroll College or the University of Montana in the editing and production of the newsletter.

Regional Publicity Workshops

This effort will be aimed at cities and regions who have expressed an interest in developing publicity efforts. These in-depth workshops will span two days with the first day aimed at skill building and the second day aimed at developing action plans. Conceptually, a staff of three will take the workshops to the regions: an editor, a facilitator and the publicity coordinator. Three, two-region workshops are planned.

Video Distribution

Montana's travel video, "America's Natural Park", will be aggressively distributed to consumer, broadcast and cable markets. One distribution option being considered involves shooting some additional footage, re-editing and placing the new production with Rand McNally, which offers a recognizable label and a proven distribution mechanism.

Publicity Blitzes

Publicity blitzes to major cities have proven to be one of the most effective ways of stimulating interest in Montana. Consistent contact with editors and producers allows for discussion of new ideas and follow-up of old ideas which may have been put aside. Cities to be visited include: Los Angeles, San Francisco, Seattle, Denver, Chicago, Des Moines, New York and Washington, D.C.

Writer Familiarization Trips

In an effort to increase the number of writers hosted in Montana and in an effort to better serve the specific needs of the regions, Travel Montana is moving toward more cooperative regional fams. Regions will be encouraged to conceptualize, organize and host their own fams. Travel Montana will help invite writers, negotiate and cover airfares, and will provide technical assistance as needed. Airfares and assistance for six fams (one per region) with five participants each is planned. Regional writer fam trip efforts will be closely tied to the publicity workshop effort described above.

Trailer Life and Motorhome Magazines

Trailer Life has planned an entire issue featuring Montana. Because of Trailer Life's specific slant, Travel Montana will become involved in the planning, recruitment of writers, renting of a motorhome and photographic support. The publicity effort will be closely coordinated with advertising support for the Montana issue of Trailer Life which is planned for April 1991. Hopefully, several articles will also be researched and written for Motorhome as a spin-off.

SATW and OWAA Bids

Montana will develop action plans to attract regional and national Outdoor Writer's of America (OWAA) and Society of American Travel Writers (SATW) conventions. Meetings of these associations can attract hundreds of writers to Montana. These writers not only attend the meeting, but linger before or afterward to develop stories. Pursuing these associations will involve becoming a member, contacting regional and national boards of directors, coordinating with various Montana regions and cities and travelling to the 1990/91 national meeting of both organizations.

Travel Magazine Research

Every 18 months Travel Montana takes a fresh look at the field of magazines and newspapers which carry travel editorial. This research is used to determine which editors will be targeted over the following period. A campaign involving the Governor's Office is planned to let the magazines editors/publishers know we are interested in working with them. The research will be conducted in early winter of 1990, with the Governor's campaign (pending the Governor's approval) breaking in early Spring.

Video News Releases (VNR)

Video News Releases (VNRs) are two to three minute news segments which are scripted, video taped, produced and then distributed by satellite to news directors at approximately 750 stations across the country. A typical VNR is seen by approximately 5 to 15 million households. Two VNR projects are planned for 1990/91, possibly including the opening of the Going-to-the-Sun Road. The VNR would portray the road opening as the beginning of the travel season in the Rockies. Ideas for a second VNR are being considered.

Calendar of Events

A winter and summer calendar of events listing dates, contact people and a short description of each event will be distributed to writers/editors with the press kits, as discussed below.

Press Kits

Summer and winter press kit mailings are planned for 1990/91. Mailings will include summer or winter vacation guides, a press release on "what's new", in-house calendar of events, and Fresh Ideas From Montana newsletter. Press kit mailings are important both to keep files updated and to express continued contact and interest by the state of Montana.

Overseas Marketing

Travel Montana actively and aggressively promotes Montana as a destination to the international travel trade with emphasis on Germany, United Kingdom, Japan and Taiwan. Assistance is given to international tour operators in planning and operating group and FIT (individual) travel in Montana, as well as increasing consumer awareness of Montana's tourism products. Emphasis is placed on working with key tour operators/wholesalers and travel agencies to establish new Montana itineraries and assist Montana suppliers in their marketing efforts overseas.

The program includes representation at key international travel trade shows, familiarization tour planning and implementation, advertising efforts, brochure distribution, education and increased tour wholesaler/operator and travel agent awareness of Montana.

Research and identification of special interest and/or specialty market niches for Montana, agricultural tour development, homestays, etc. and how to best capitalize on them will be conducted with reference lists developed. An ongoing international publicity program to the travel trade allows Montana a means to create consumer demand without the extremely high advertising rates abroad.

Pacific Rim

Montana's offices in Tokyo and Taipei are legislatively mandated and funded by three entities: tourism, agriculture and manufacturing. The trade office representatives market Montana's travel-related products and services to the travel trade in their respective countries under close direction from Travel Montana. Their responsibilities include dealing with wholesalers, operators and travel agents, creating demand for Montana's travel-related products and services, distribution of travel materials, translation of Montana literature and attendance at travel trade shows. These create demand for products and services in addition to encouraging the travel trade and special interest groups to create Montana tours and market them.

American Rockies/Highway 89 - This program is a joint venture between Montana, Wyoming and Utah and six major Japanese wholesalers. The program started in 1987 using the catch phrase "Highway 89 in 89" and has evolved into the "American Rockies on Highway 89" program.

In 1990/91 the program will consist of a familiarization tour for 20 tour wholesalers, sales calls to the California offices of the Japanese tour wholesalers and a travel trade mission to Tokyo and Osaka. The sales calls and trade mission will include workshop/presentations and the possibility of participation by the Montana private sector.

Familiarization Tours - Familiarization tours are conducted to provide personal, firsthand site inspections for prospective group tour operators. By experiencing Montana, these tour operators better understand the mechanics of designing new itineraries in Montana.

Montana Video - Translation of Montana's 15-minute summer video into Japanese and possibly Chinese.

International Language Literature - Revision of current brochures and production of new brochures in other languages, as needed.

Special Project Development - Identify for listing and reference purposes Montana suppliers interested in:

-Homestay programs;
-Agricultural and industrial tour development;
-Translator/translation capabilities available.

Western Europe

The European program includes marketing both independently and in cooperation with the Old West Trail Foundation to establish Montana as a tourism destination. Rather than having a trade office in Europe, Travel Montana will continue to use the services of a specialized travel representative, on a contractual basis.

Trade Mission to Germany & London - The business foundation of the mission is a prearranged schedule of travel industry and press appointments in the markets to be visited. Each market visit may conclude with a promotional function, including destination presentations or other promotional events for targeted travel industry and media representatives.

Familiarization Tours - Several fam tours for tour operators and the media are scheduled, and others may be added.

Trade Shows - Attendance at the main international travel trade shows allows Montana consistent contact with wholesalers/operators and the opportunity to follow-up on new and existing projects and ideas.

Trade Advertisements - To heighten awareness of travel trade representatives, timely insertions in travel trade publications enhance Montana's image. Unique promotional posters will also be created and made available for display in retail outlets promoting travel to Montana.

European Representation - Contracting independently for European representation allows Montana to maximize and to capitalize on expenditures and exposure of generic U.S. tourism promotional campaigns abroad. Montana's contract encompasses every aspect of travel development, including trade show representation, brochure distribution, familiarization tour planning, promotions, radio/television, printed media publicity projects and organization of trade missions.

Montana Video in European Format - Production of additional copies of the PAL format video for use in Germany and the United Kingdom, plus production of a limited number of copies in the French SECAM format.

Direct Mail Campaign - This specialized direct mail program provides current tour planning material to tour operators and follow-up to contacts initiated during trade shows. This program also establishes and maintains a professional rapport with overseas group travel planners.

Overseas Group Travel Workshop - In-depth educational seminar focused on overseas group travel in Montana. The main emphasis will be on how to most effectively sell Montana and work with the overseas travel market, as well as hosting of international visitors. International marketing strategies will also be analyzed.

US/Canadian Group Travel

Travel Montana markets directly to group tour operators from throughout the United States and Canada. Montana is promoted as a tour destination, as well as a viable stopover on tour itineraries passing through Montana. The Domestic Group Tour program promotes all seasons of Montana which encompasses activities from sightseeing, to river rafting, to skiing.

Familiarization Tours

Familiarization tours are conducted to provide personal, firsthand site inspections for prospective group tour operators. By experiencing Montana, these tour operators will better understand the mechanics of designing new itineraries in Montana.

Direct Mail

This specialized direct mail program will provide current tour planning material to tour operators. This program will also establish and maintain a professional rapport with group travel planners throughout the United States and Canada.

Tour Kits - The "newsletters" will be distributed on a quarterly basis to approximately 1,750 targeted group tour planners. These tour kits will feature promotional text prepared by Travel Montana highlighting tour attractions throughout the state and specific tour suggestions.

Calendars - A targeted, select mailing of 350 Montana Calendars will be made to group tour operators. Featuring many aspects of Montana, these calendars will provide positive reinforcement of Montana as a tour destination.

Montana Magazines - These bimonthly magazines will be sent to 150 targeted group tour operators. With new tour attractions featured in each issue, this direct mail effort will inform and educate group tour operators. A unique flap folder indexing specific articles within each issue will be attached to the magazines to attract the tour planner's interest.

Travel Trade Shows

By attending select travel shows and conventions, contacts can be made with prospective group tour operators and new and expanded Montana itineraries can be discussed and promoted.

National Tour Association (NTA) - Travel Montana will attend both the annual marketplace and convention in Montreal in November and the Spring Exchange in Portland in April of 1991. Two representatives will attend the fall marketplace and one will attend the spring meeting.

American Bus Association (ABA) - This is ABA's annual marketplace and convention, scheduled for early December in Niagara Falls.

Tour Operator Consumer Shows - Montana will attend two select tour operator shows, in order to enhance and support the sale of Montana tours packaged by the sponsoring tour operators. These shows will be in St. Louis, Missouri and Dallas, Texas.

Ontario Motorcoach Association (OMCA) - Travel Montana will become an Affiliate Member of this Canadian motorcoach association, in an effort to more fully capitalize on the Canadian group market. No plans have been made to attend their marketplace and convention in 1990.

Ski the West Fest - Sponsored by Delta Air Lines, the show is attended by approximately 300 travel agents from throughout the United States. The show is scheduled for September 27-29 in Salt Lake City.

Sales Calls

Personal sales calls will be made to select group tour operators, in an effort to assist in the development of new and expanded Montana tour programs. These professional sales calls will also work to establish and maintain the Montana presence in key markets. The sales calls will be made, wherever possible, in conjunction with Travel Montana media advertising and/or will be combined with consumer shows to be attended by Travel Montana.

Group Travel Workshop

This seminar/workshop will focus on group travel in Montana. The main emphasis will be how to most effectively sell information and work with the group travel market by maximizing promotional budgets, as well as hosting and retaining existing motorcoach business.

Agriculture Tour Development

Together with the Montana Department of Agriculture, Travel Montana will work toward the development of a statewide, comprehensive inventory of agriculturally-related tour options. Travel Montana will then be better able to promote and market new specialized tour concepts.

Advertising/Marketing

Specific projects will be undertaken by Travel Montana to heighten consumer awareness, as well as the awareness of group tour operators in the United States and Canada.

Montana Event at National Tour Association - Travel Montana, in cooperation with the private tourism sector of Montana will provide entertainment during the "Taste of North America" function at the Fall Convention in Montreal. This function will be attended by approximately 3,500 tourism professionals in attendance. A video presentation will highlight this show.

Tour Operator Cooperative Projects - Travel Montana is exploring the possibility of undertaking cooperative consumer advertising efforts in select markets, in order to enhance tour operator awareness.

Promotional Posters - By creating and then distributing these new posters, Travel Montana will work to increase consumer awareness. Distribution channels will include travel agencies, group tour offices, conventions and trade and consumer shows, both in the United States and abroad.

Magazine Advertising - In fiscal year 1990/91, Travel Montana will introduce a new and exciting advertorial layout design for both Destinations and Courier Magazines. In a cooperative purchasing effort, reduced advertising rates will be extended to participating tourism businesses and associations in Montana.

Courier Magazine - A trade magazine of the National Tour Association, this magazine is distributed free of charge to some 500 NTA group tour operator members and to approximately 3,000 tour supplier members. This will be a cooperatively funded project with the private tourism sector of Montana.

Destinations Magazine - Similar to Courier, the Destinations magazine is a travel trade publication distributed to both group tour operators and tour suppliers. This project will also be a cooperatively funded effort with the private tourism sector of Montana.

Group Tour Planning Guide

The Montana Group Tour Planning Guide is designed to be an "all-in-one" tour planning reference. With listings of attractions, events, hotels and restaurants, the Group Tour Planning Guide encompasses the points of interest of the tour planner designing a Montana itinerary. The new edition will include changes and additions to accommodate the international, as well as domestic markets.

Industry Services

As Montana becomes better known as a travel destination, it is necessary to service travellers in such a manner that they speak highly of their Montana vacation experience to friends and have the desire to return again.

Travel Montana's industry services are aimed at supporting and cooperating with the private sector to create an atmosphere of western hospitality, an awareness of the benefits of travel and advanced marketing efforts which assist residents in improving and increasing their business, as well as the state's travel industry and economic base.

Disbursement of Regional/CVB Funds

The Lodging Tax Law specifies that approximately 23.5 % of the accommodations tax proceeds will be returned on a prorated basis to the six tourism regions and eight qualifying cities (as shown on page 8) for their promotion as a travel destination or movie filming location. While all market plans and projects must be approved by the Tourism Advisory Council, organizations are encouraged to use their knowledge to promote their best selling points. Typical projects undertaken by those organizations include brochures, travel guides, television advertising, full-color and directory print ads, convention marketing and consumer and trade show exhibiting.

Program components for FY 90/91 include:

-Presentation of market plan and projects to Tourism Advisory Council for approval. Assistance in development is available from the Department if desired.

-Quarterly financial compliance reporting.

-Semiannual program compliance reporting.

-Annual audits of organizations by the Department.

-Production of a new, up-to-date, streamlined book of marketing guidelines, designed for wide distribution.

Superhost

The Montana Superhost program is designed to provide an ongoing, comprehensive, community based system for the proper hosting of visitors and for improving visitor information resources throughout Montana.

Listed below are the desired accomplishments of this program for the coming year.

Evaluations and surveys - Evaluate the requirements for Superhost designation and the effectiveness of the program, with the cooperation of statewide chambers, designated communities and potential designees.

Revision of Manuals - Following a thorough evaluation of hospitality training in other states and provinces the Superhost manuals will be redesigned, as needed, to become a better quality publication which will provide added stability to the training program.

Regional Training - Six in-depth training seminars will be held throughout the state in April 1991.

International Designation and Smaller Communities - In an effort to continue to increase the number of participants in the program, guidelines will be established for international designation, as well as methods to incorporate small communities into the program which do not have a chamber.

Video and Logo - Both items will be evaluated for effectiveness and appropriateness to the existing program. Should changes be warranted these two items will be produced anew.

Governor's Conference on Tourism and Recreation

The focus and purpose of the annual Governor's Conference on Tourism and Recreation, coordinated by Travel Montana, is to provide marketing tips and trends, hands-on workshops and to encourage networking between industry members.

The 1991 conference will again include participation and coordination between Travel Montana and the recreation agencies - Fish, Wildlife and Parks, the Bureau of Land Management and the U.S. Forest Service. Many of the topics selected for presentation will be the result of input from previous conference attendees.

The 1991 conference will become a two-day event, as requested by the industry. Dates and location will be determined by the Tourism Advisory Council.

The annual travel conference is a self-sustaining budget, supported by a registration fee to attendees and numerous sponsors.

Instate Public Relations

Public relation programs provide an avenue to increase awareness among Montanans of the value and impact of the travel industry to the economy of the state and are a cost effective means to disperse information, marketing tips and trends.

Montana Travel Update - This newsletter will be published quarterly by Travel Montana, in cooperation with the Institute for Tourism and Recreation Research. Regular features include perspectives from guest columnists, advertising campaigns, research projects and industry events.

Inside Commerce - Travel-related contributions are regularly written for this newsletter, which is primarily distributed instate.

News Media - Instate media, both electronic and print, will be contacted as frequently as feasible and given written press releases or interviews on subjects which are newsworthy and educational to residents.

Education - Opportunities will be pursued and evaluated during the year on methods to incorporate information into the standard elementary school curriculum on the importance of the travel industry to Montana's economy, as well as consideration of possible involvement by school children in certain promotions.

Tourism Infrastructure Development

As Montana strives to promote its vast tourism potential, it becomes clear that all must pull together to best achieve common goals. The main emphasis of this area is to coordinate and facilitate cooperative marketing and promotional efforts between federal and state agencies and private sector interests.

Interagency Coordination

Extensive cooperative partnerships will be further cultivated between appropriate state and federal agencies, such as the Department of Agriculture, Department of Fish Wildlife & Parks, Department of Natural Resources, Montana Historical Society, United States Forest Service, National Park Service, Bureau of Land Management, etc.

Counseling and Education

The Infrastructure Development area is also aimed at providing technical assistance to the private sector on tourism marketing issues. Additionally, workshops may be conducted as an effective way to inform and educate the private sector on new state and federal efforts relating to tourism development in Montana.

Financial Assistance

An extensive inventory of financing options will be compiled to more effectively assist private sector businesses desiring tourism development funding. This inventory would include available federal, state, regional and private sources of monies in the form of loans, grants and matching funds opportunities.

Government and Public Relations

By working closely with various federal and state agencies and continuing interaction with private sector interests, a positive public and government relations atmosphere will be generated. Issues on a national, state, and regional level will be monitored in an ongoing effort to keep the Montana tourism industry in an "active" position.

Visitor Information Center Proposal (HB 550)

House Bill 550, passed by the 1989 Legislature, requires the Department of Commerce to present to the 52nd Legislature a plan for a system of Visitor Information Centers in Montana.

Elements of the Proposal:

-A determination of the feasibility of constructing and operating a system of V.I.C.'s;

-Designation of the most beneficial and effective sites for the V.I.C.'s;

-A determination of the land needed for the V.I.C.'s, including estimated cost of acquiring the land;

-Architectural and artistic designs for the V.I.C.'s, suggested staffing and operating plan;

-A formal proposal for funding the design, construction, maintenance and operation of the centers.

According to House Bill 550, $32,940 has been appropriated for the study during fiscal year 1990/91. One-third of those funds will come from the Department of Highways and two-thirds from the Institute for Tourism & Recreation Research. The study began in September of 1989.

Throughout the process, Travel Montana has counted on the active participation of the Tourism Advisory Council, the Montana Department of Highways, the United States Forest Service (USFS), the Montana Department of Fish, Wildlife & Parks, the School of Architecture at Montana State University, the Institute for Tourism & Recreation Research; and on the invaluable cooperation of Montana communities.

Status Report as of June, 1990:

-Nonresident traffic counts have been made at all land entrances to Montana;

-Site selections have been made for proposed Visitor Information Centers in seven locations located throughout Montana;

-Preliminary data has been gathered from each selected site pertaining to land acquisition options, local level of support and local funding options;

-Initial architectural designs were prepared and then presented by the Montana State University (MSU) School of Architecture for each of the selected sites;

-Alternative funding research has been conducted.

Tasks to be Accomplished in FY 1991:

-Final detail information will be solicited from selected sites pertaining to co-op funding options, land acquisition and staffing;

-Detailed funding research will be finalized;

-Proposed architectural plans will be finalized for each selected site to include design, location and construction cost;

-A final proposal to be submitted to the 1991 Legislature will be drafted by October, outlining in detail the proposed system of Visitor Information Centers in Montana. Site selection criteria, proposed architectural layouts, funding proposal, staffing and seasonality will all be included.

Motion Picture, Television and Commercial Promotion

Travel Montana promotes the state domestically and internationally as a filming location destination for feature films, television specials, television commercials and documentary films.

The function of this program is to provide information and support services to the motion picture industry and to provide location scouting for directors, producers, production managers and location managers seeking locations.

Trade Advertising

Ad insertions in the main industry publications are aimed at building and sustaining images for Montana as a prime film location. Montana ads will be featured in the following publications: American Film, American Cinema, Millimeter, AFC Locations, Location Update, Studio BluBook, Production Masterguide, Hollywood Reporter and Weekly Variety.

Publications

Production of a Montana Motion Picture and Television Location Guide will be distributed to the motion picture industry to attract filming in Montana. This fifty-page guide lists services; contacts for federal, state, city offices; weather data; information on various locations; air charter; helicopter services and photos of Montana locations.

The Movie Location Guide will be completely redesigned this year, to better suit the needs of production companies. Approximately 2,500 copies will be published.

Trade Show and Film Festivals

To market and increase awareness of Montana as a film destination on a one-to-one basis, Montana will be present at major industry trade shows and film festivals in the United States and foreign markets.

Los Angeles Expo 91 - A major annual motion picture industry trade show attracting up to 6,000 major decision makers in the U.S. and international market. The show is jointly sponsored by American Film Mart and the Association of Film Commissioners International.

Sundance/US Independent Film Festival - A nationally recognized film festival held in Park City, Utah, where writers, producers and directors meet and conduct workshops and view recent feature films and documentaries. Montana made films are often released here. The show is co-sponsored by the Sundance Institute which was founded by Robert Redford.

Montana to co-op with other members of the Association of Film Commissioners.

Cannes Film Festival - The most prestigious film festival in the world. The growing numbers of foreign film makers filming in the United States and Montana has shown us that this is a viable market. Attendance at the show allows for numerous contacts to be made with British, German, Dutch, Austrian, French and Italian producers and movie makers, as well as new contacts from the United States.

Contingent upon the co-op venture with the Association of Film Commissioners and a number of states attending.

Evaluation Mechanisms

A review of inquiries and response to advertising and marketing. Success is measured by the number of projects filmed in Montana and the economic impact on the economy. Figures on dollars spent in Montana are obtained from the production companies upon completion of projects.

EZ 2 LUV Campaign

The purpose of the EZ 2 LUV campaign is to develop a better economic climate for Montana by generating pride in the state. As an in-state promotion it will be aimed at all sectors of the population. The message is simple and upbeat and reminds Montanans that our state is a great place to live, work and play.

The campaign was developed by Travel Montana, but is broader than just tourism and will include participation and funding by other Montana industries.

Initial efforts will be made on a grass roots level allowing the campaign to work strictly as an image campaign. It will be an upbeat campaign that fits in with the style of Montanans.

Outdoor Billboards have been placed throughout the state to initiate interest in the program. This dramatic, graphic medium will effectively give the theme a tangible, visible focus.

Soundtrack is a lively musical theme produced for EZ 2 LUV and will be essential to the emotional impact of the campaign. This music will be utilized for radio spots to be run as public service announcements. These radio spots will be adaptable to donut interviews with Montanans who are making the state EZ 2 LUV. Television spots, using this same musical theme could potentially be produced at a later date.

Other Efforts and Opportunities being pursued include the merchandising of EZ 2 LUV products (i.e. clothing, mugs, caps, pins, window decals, etc.), involvement by school children in the promotion through essays and coloring contests, corporate sponsorship and private sector/community involvement by recognizing individuals who are making Montana EZ 2 LUV.

Travel Montana Marketing Calendar 1990 · 1991

	July	August	September	October
Consumer Advertising		Fall Magazine Ads Fall TV Ads—Regina, Spokane, North Dakota, South Dakota	Fall TV Ads—TNN/CNFR (29-30)	Ski MT Nat'l Magazine Ads Cross Country Ski Magazine Ads Snowmobile Magazine Ads Ski Montana TV Ads—Lethbridge, Regina, Western North Dakota, Eastern North Dakota, Spokane Ski Montana Billboards—Seattle, Minneapolis, North Dakota, South Saskatchewan Ski Montana Airport Displays—Salt Lake City Invite-A-Friend to Ski
Trade Advertising & Promotions	Tour Operator Direct Mail—Montana Magazine	Tour Operator Direct Mail—Tour Kit	Tour Operator Direct Mail—Montana Magazine Editors/Writers Direct Mail—Fresh Ideas From Montana (20) Winter Press Kit Direct Mail (20)	Nova Reisen Tour Catalog—Germany
Familiarization Tours	Tokyo Tour Operators—Northwest Airlines (3-7)	Japan Tour Operators—American Rockies/Hwy 89 (Aug 31-Sep 4)	Osaka/Kumamoto Tour Operators—Northwest Airlines (7-11) Taiwanese Tour Operators—United Airlines (9-12) German Travel Agents (Sep 30-Oct 6) U.S. Tour Operators—Montana/Alberta (6-11) German Press Tour (7-14)	
Tourism Events & Projects		Tourism Advisory Council Meeting (3-4) Regional Publicity Workshops (20-30)	Montana Travel Update	Tourism Advisory Council meeting (29-30) Group Travel Workshop (12)
Sales & Trade Missions			European Trade Mission (Sep 21-Oct 3)	Group Travel Sales Calls/Hwy 89—California (10-12) East and West Coast Publicity Blitzes (Oct 7-Nov 3)
Trade Shows		Cinepostum '90—Philadelphia (25-29) Huddle West—Calgary (23-25)	Ski the West Fest—Delta Air Lines—Salt Lake City (27-29)	Pow Wow Europe—Paris (25-30)
Consumer Travel Shows				Ski Montana Road Show
Publications	Group Tour Planning Guide	Montana Travel Update	Winter Guide Snowmobile Guide Winter Calendar of Events	

	November	December	January	February
Consumer Advertising	Ski Montana Nat'l Magazine Ads Cross Country Ski Magazine Ads Snowmobile Magazine Ads			Invite-A-Friend/EZ 2 LUV Campaign (coupons, billboards, newspapers)
Trade Advertising & Promotions	Group Travel Calendar Direct Mail Tour Operator Direct Mail—Tour Kit Tour Operator Direct Mail—Montana Magazine Editors/Writers Direct Mail—Fresh Ideas From Montana (20)	Destinations Magazine Ad Movie Location Magazine Ads	Movie Location Magazine Ads Tour Operator Direct Mail—Montana Magazine	Destination USA Ad—Germany Tour Operator Direct Mail—Tour Kit Courier Magazine Ad Editors/Writers Direct Mail—Fresh Ideas From Montana (20) Summer Press Kit Direct Mail (20)
Familiarization Tours			Japanese Tour Operators—Continental Airlines	U.S. Tour Operators Ski Fam—Delta Air Lines
Tourism Events & Projects		Montana Travel Update	List of Potential Travel Montana Co-ops mailed to Regions/CVB's Tourism Advisory Council Meeting (7-8)	
Sales & Trade Missions			Group Travel Sales Calls—Dallas	
Trade Shows	National Tour Association (NTA) Fall Exchange—Montana Event—Montreal (10-19) Holstring Festival—Kumamoto (22-26)	American Bus Association (ABA) Marketplace—Niagara Falls (1-5)	Sundance/U.S. Independent Film Festival—Park City, UT (18-27)	
Consumer Travel Shows			Anaheim Sports & RV Show (5-13) To-Ro Sports Show—Seattle (Jan 30-Feb 3) Dan Dipert Travel Show—Dallas (12-13)	
Publications	Montana Travel Update	Movie Location Guide	Highway Map	Montana Travel Update Travel Planner Vacation Guide

	March	April	May	June
Consumer Advertising	Spring/Summer Magazine Ads Invite-A-Friend to Golf Summer TV Ads—Washington, Alberta, Colorado, Minnesota, South Dakota, Nebraska, Utah	Spring/Summer Magazine Ads Invite-A-Friend to Golf Summer TV Ads—Washington, Alberta, Colorado, Minnesota, South Dakota, Nebraska, Utah	Spring/Summer Magazine Ads Invite-A-Friend to Golf Summer TV Ads—Washington, Alberta, Colorado, Minnesota, South Dakota, Nebraska, Utah	
Trade Advertising & Promotions	Contact USA—Pow Wow Magazine Tour Operator Direct Mail—Montana Magazine	Destination USA—Germany	Tour Operator Direct Mail—Tour Kit Tour Operator Direct Mail—Montana Magazine Editors/Writers Direct Mail—Fresh Ideas From Montana (20)	
Familiarization Tours	U.S. Tour Operators Ski Fam—Northwest Airlines		European Tour Operators—Pre or Post Pow Wow U.S. Tour Operators—Montana/Wyoming European Writers	European Writers
Tourism Events & Projects	Tourism Advisory Council meeting (3) Governor's Conference on Tourism & Recreation (11-12) Overseas Group Travel Workshop (3) Montana Travel Update	Regional Superhost Workshops		Tourism Advisory Council meeting (10-11) Montana Travel Update
Sales & Trade Missions	Group Travel Sales Calls—St. Louis	Japan Trade Mission—American Rockies/Hwy 89 Group Travel Sales Calls—Minneapolis		
Trade Shows	Los Angeles Expo '91 (1-5)	National Tour Association (NTA) Spring Exchange—Portland (21-24)	Cannes Film Festival—France TIA/Pow Wow—Denver (11-15)	
Consumer Travel Shows	Colorado RV & Adventure Travel Show—Denver (6-10) Northwest Sportshow—Minneapolis (Mar 29-Apr 7) Tour Expo '91—St. Louis (9-10)			
Publications		Summer Calendar of Events		

*Dates listed are subject to change.

Tourism Facts and Figures

Listed in the following pages are charts, along with facts and figures reproduced from various research studies and publications, aimed at providing a broad overview of the Montana tourism industry — its economic impact and its makeup.

Tourism Facts and Figures

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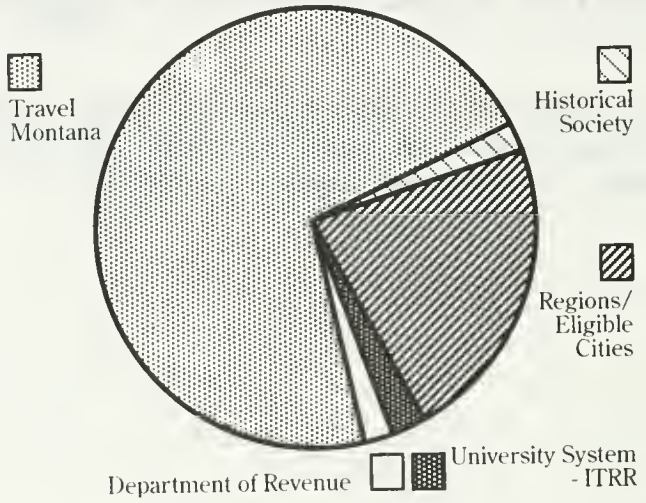
The Lodging Tax: Montana's Sole Funding Source For Tourism Promotion



Department of Revenue 2.0%
(Tax Collection and Enforcement)
(Reimbursement to General Fund-tax paid by state employees on business)

University System-ITRR 2.5% (Tourism Research)

Historical Society 1.0% (Roadside Sites & Signage)

Travel Montana 75.0% (Marketing)

Regions/Eligible Cities 25.0% (Marketing)

Lodging Tax Revenue
Report prepared July 1, 1990

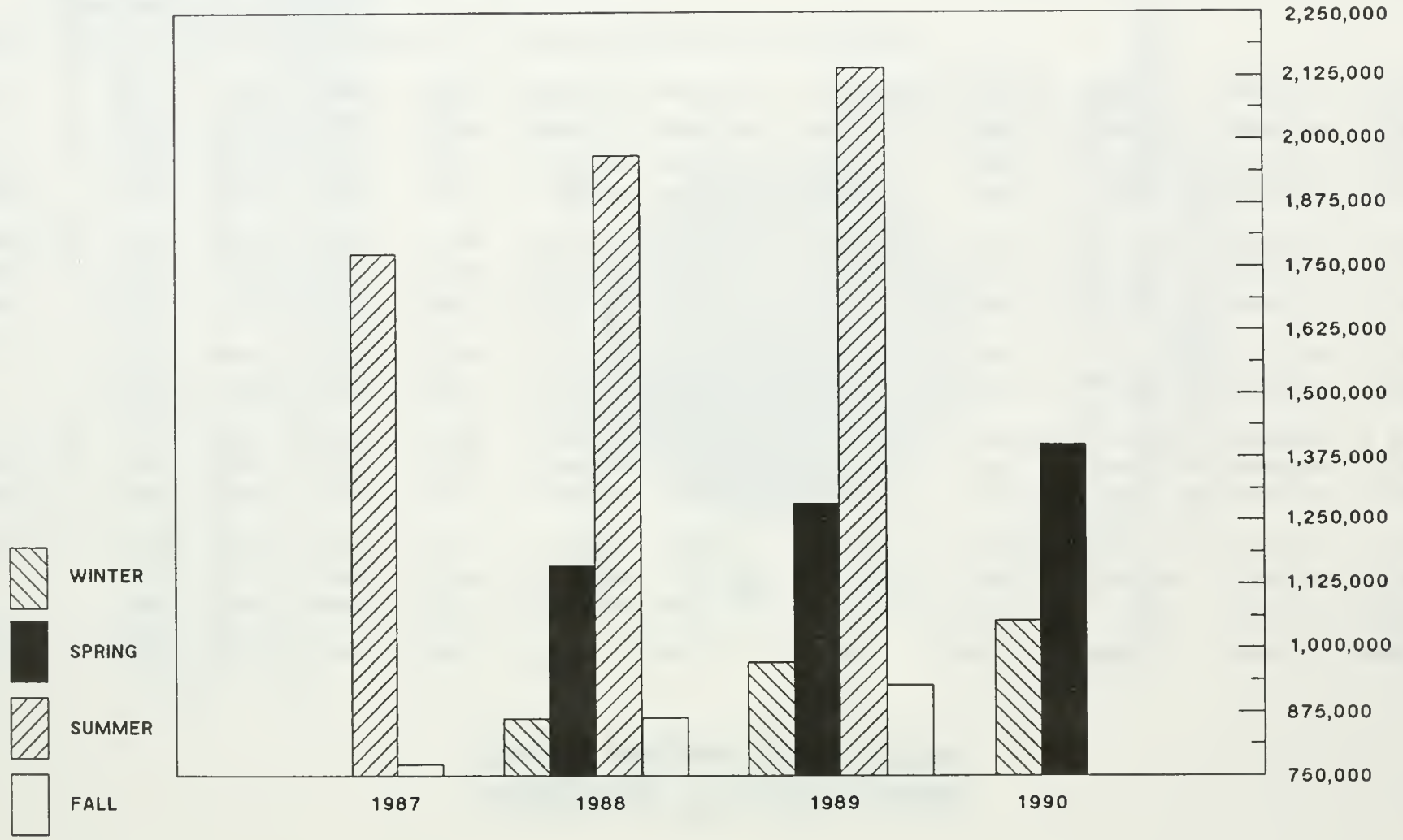
Region/City	1987 7/1-9/30	10/1-12/31	1988 1/1-3/30	4/1-6/30	7/1-9/30	10/1-12/30	1989 1/1-3/30	4/1-6/30	7/1-9/30	10/1-12/31	1990 1/1-3/31
Glacier	$ 583,287	$184,887	$230,399	$ 338,549	$ 679,845 (+14%)	$223,546 (+14%)	$268,162 (+12%)	$ 369,619 (+8%)	$ 748,788 (+8%)	$232,479 (+5%)	$ 286,713 (+7%)
Kalispell	$ 97,849	$ 32,310	$ 35,217	$ 61,775	$ 121,129 (+24%)	$ 41,514 (+28%)	$ 42,366 (+20%)	$ 69,296 (+12%)	$ 123,971 (+2%)	$ 47,383 (+13%)	$ 46,877 (+11%)
Missoula	$ 147,836	$ 84,306	$ 73,674	$ 124,472	$ 177,589 (+20%)	$ 93,545 (+11%)	$ 76,319 (+4%)	$ 139,893 (+12%)	$ 183,904 (+4%)	$ 95,835 (+2%)	$ 82,172 (+8%)
Gold West	$ 264,650	$130,588	$115,982	$ 179,411	$ 275,872 (+10%)	$138,037 (+11%)	$131,699 (+12%)	$ 204,277 (+13%)	$ 296,552 (+7%)	$143,735 (+3%)	$ 133,090 (+1%)
Butte/Silver Bow	$ 89,979	$ 43,019	$ 45,061	$ 66,212	$ 106,424 (+18%)	$ 48,491 (+13%)	$ 50,314 (+12%)	$ 77,654 (+17%)	$ 109,736 (+3%)	$ 49,722 (+3%)	$ 52,142 (+4%)
Helena	$ 81,213	$ 51,627	$ 52,067	$ 69,069	$ 89,426 (+10%)	$ 52,102 (+1%)	$ 60,711 (+17%)	$ 77,906 (+13%)	$ 93,859 (+5%)	$ 56,820 (+9%)	$ 57,834 (−5%)
Russell	$ 196,321	$121,565	$109,209	$ 155,070	$ 230,429 (+17%)	$138,891 (+14%)	$132,256 (+21%)	$ 176,530 (+14%)	$ 251,342 (+9%)	$151,804 (+9%)	$ 137,077 (+4%)
Great Falls	$ 114,735	$ 76,733	$ 73,353	$ 98,857	$ 138,724 (+21%)	$ 91,652 (+19%)	$ 95,168 (+30%)	$ 115,283 (+17%)	$ 151,644 (+9%)	$ 98,175 (+7%)	$ 95,434 (+0%)
Yellowstone	$ 381,874	$121,503	$211,442	$ 202,405	$ 407,368 (+7%)	$137,389 (+13%)	$238,710 (+13%)	$ 224,100 (+11%)	$ 452,478 (+11%)	$166,848 (+17%)	$ 285,925 (+20%)
Bozeman	$ 98,478	$ 50,853	$ 56,047	$ 72,327	$ 108,119 (+11%)	$ 55,043 (+9%)	$ 62,673 (+13%)	$ 88,941 (+23%)	$ 123,271 (+14%)	$ 65,481 (+19%)	$ 74,118 (+18%)
W. Yellowstone	$ 110,549	$ 17,463	$ 37,397	$ 40,879	$ 102,747 (−7%)	$ 21,334 (+22%)	$ 39,646 (+6%)	$ 41,174 (+1%)	$ 121,894 (+19%)	$ 22,746 (+7%)	$ 48,534 (+22%)
Missouri River	$ 43,005	$ 30,623	$ 24,612	$ 35,324	$ 43,920 (+2%)	$ 30,283 (−1%)	$ 22,215 (−10%)	$ 36,026 (+2%)	$ 45,721 (+4%)	$ 32,360 (+7%)	$ 24,131 (+9%)
Custer	$ 309,094	$184,626	$171,718	$ 253,471	$ 332,391 (+8%)	$201,020 (+9%)	$185,530 (+8%)	$ 278,480 (+10%)	$ 357,918 (+8%)	$212,107 (+6%)	$ 205,036 (+11%)
Billings	$ 214,045	$138,651	$140,190	$ 187,466	$ 238,654 (+11%)	$154,319 (+11%)	$152,810 (+9%)	$ 204,662 (+9%)	$ 253,830 (+6%)	$160,945 (+4%)	$ 167,010 (+9%)
TOTALS	**$1,778,234**	**$773,795**	**$863,364**	**$1,164,232**	**$1,969,827** (+11%)	$869,168 (+12%)	$978,574 (+13%)	$1,289,035 (+10%)	$2,152,800 (+9%)	$939,335 (+8%)	$1,071,973 (+10%)

Please Note: 1. Gold West and Glacier Country percentage increases listed for July 1−December 30, 1988 are adjusted to reflect transfer of Ravalli County.

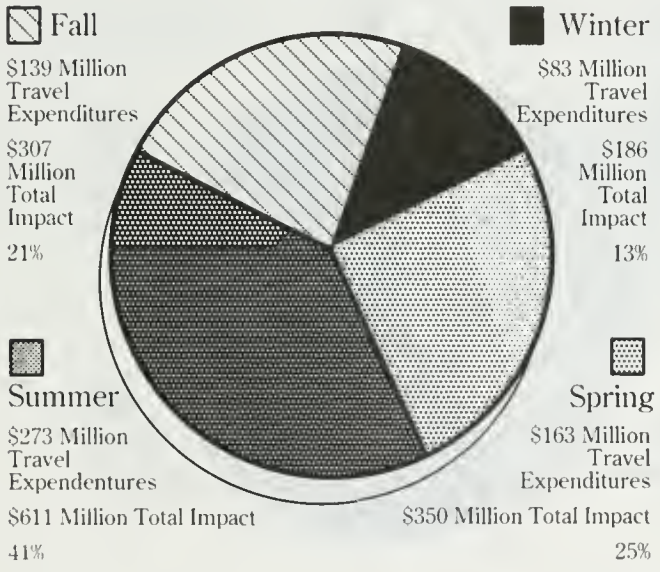
2. Region totals listed include city totals listed below.

3 Percentages listed to the right are increases or decreases over same period previous year.

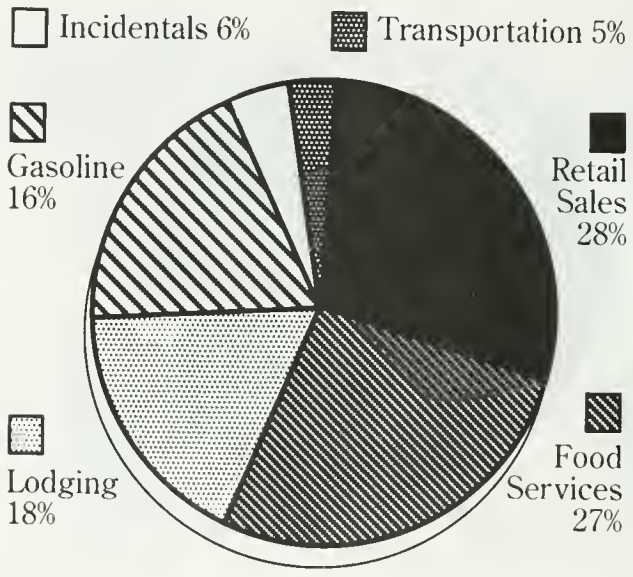
Statewide Lodging Tax Revenues
Summer 1987 - Spring 1990
Prepared October 19, 1990



Travel Expenditures and Total Economic Impact Generated by Season



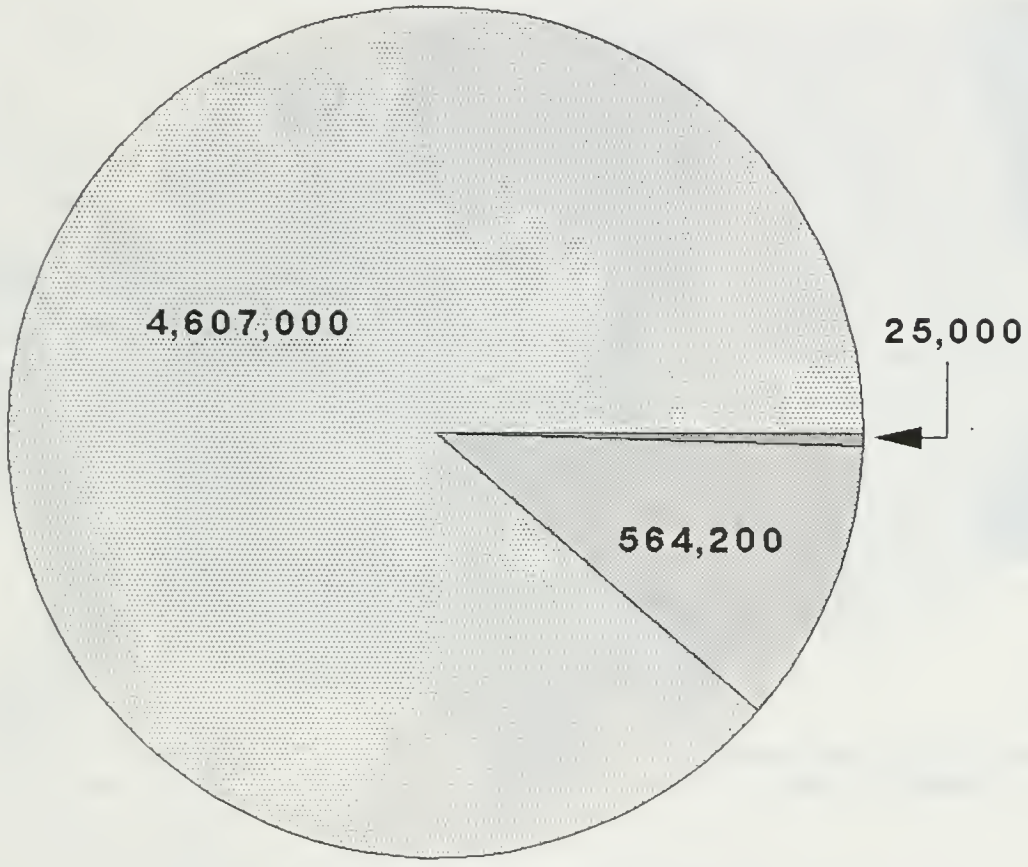
How the Nonresident Travel Dollar is Spent



Retail sales and food services accounted for over half of the nonresident travel expenditures in Montana last year.

Number of Non-Resident Visitors to Montana

Year 1988



Total: 5.2 Million Visitors

United States

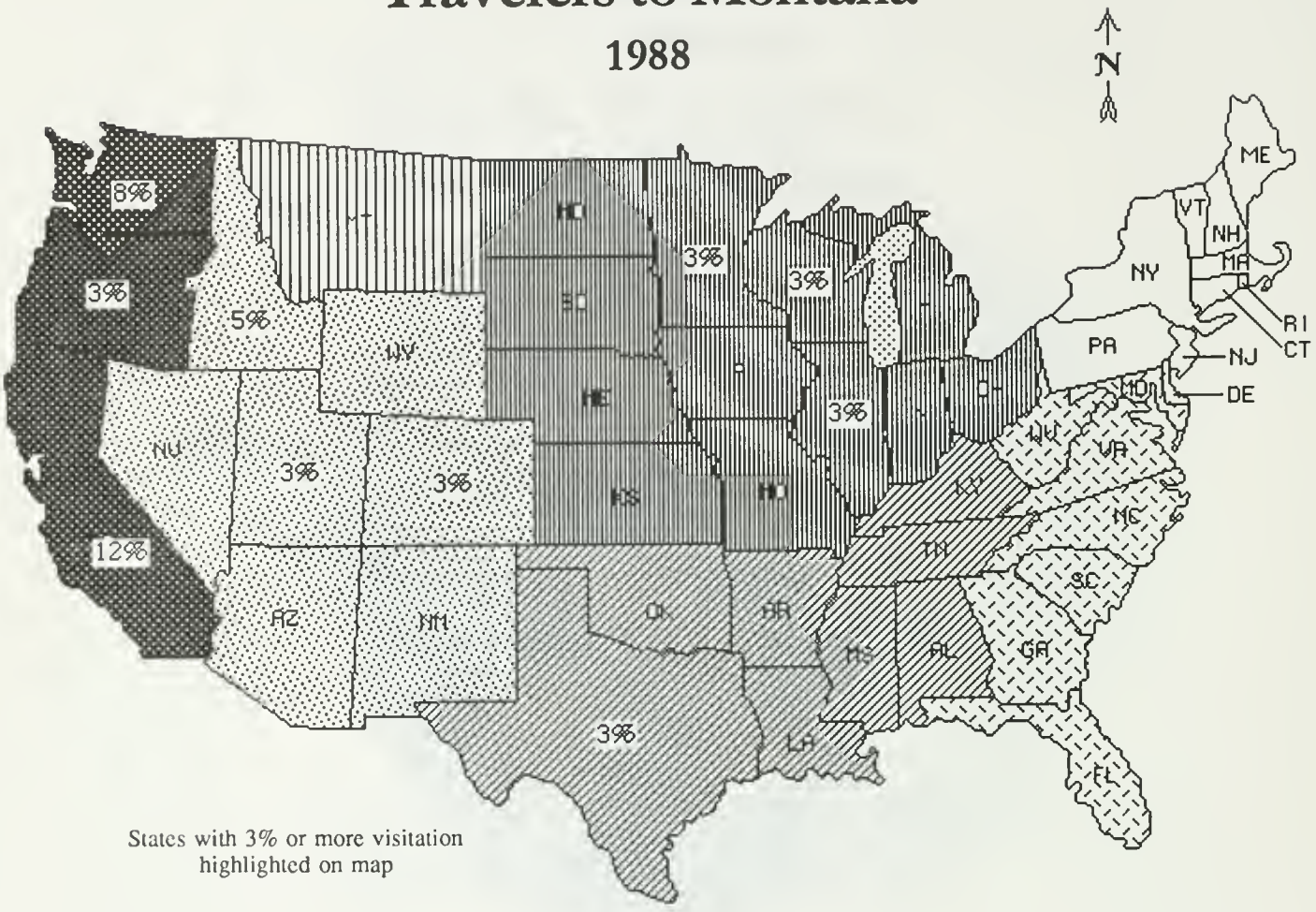
Canada

Overseas

SOURCE: USTTA

State and Region of Vacation Travelers to Montana

1988



States with 3% or more visitation highlighted on map

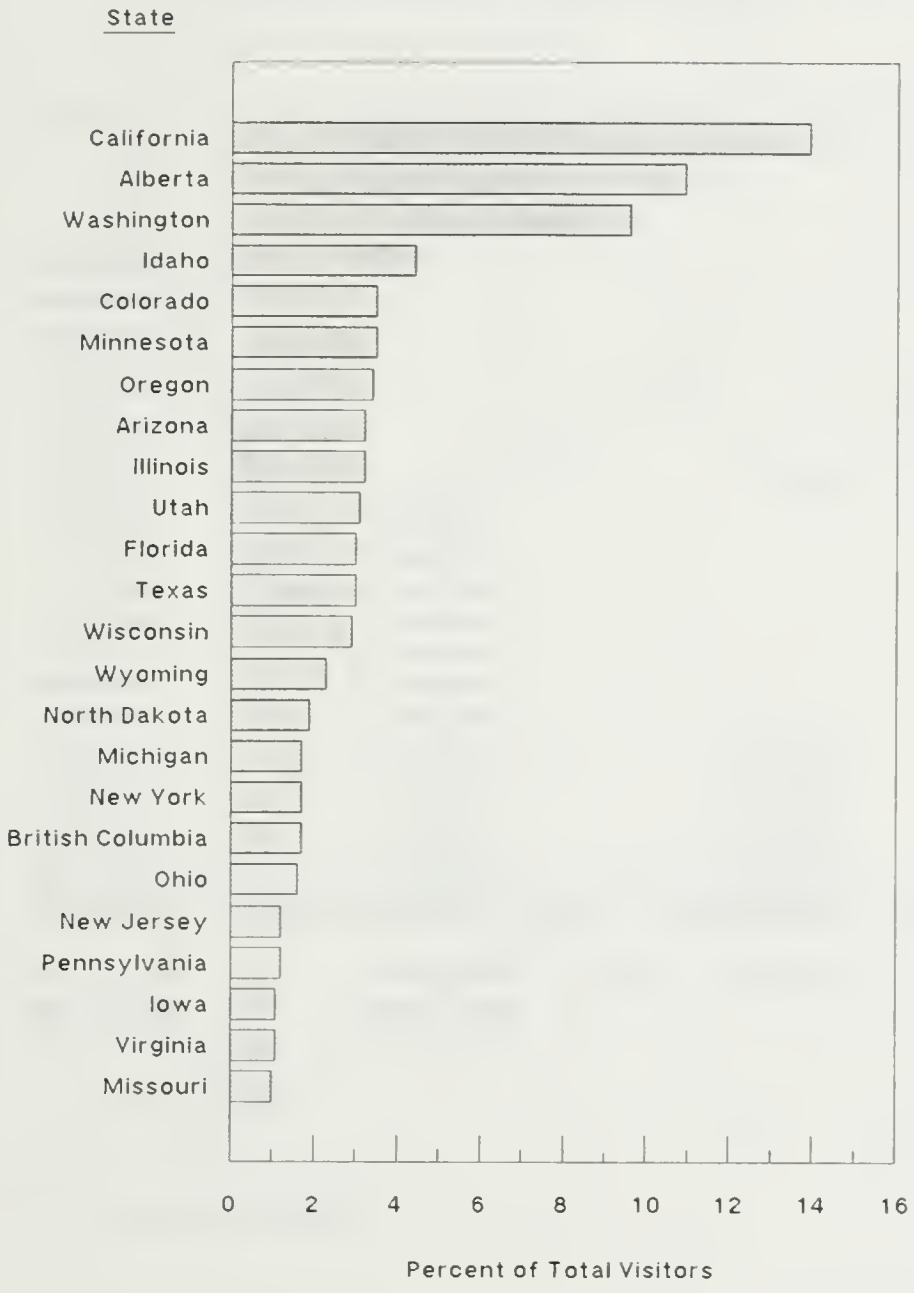
Canada	19%
Alberta	14%
B.C.	2%
Other Prov.	3%
Other Countries	3%

Pacific	23%	South	6%
Mountain	16%	S. Atlantic	8%
North Central	18%	Northeast	7%

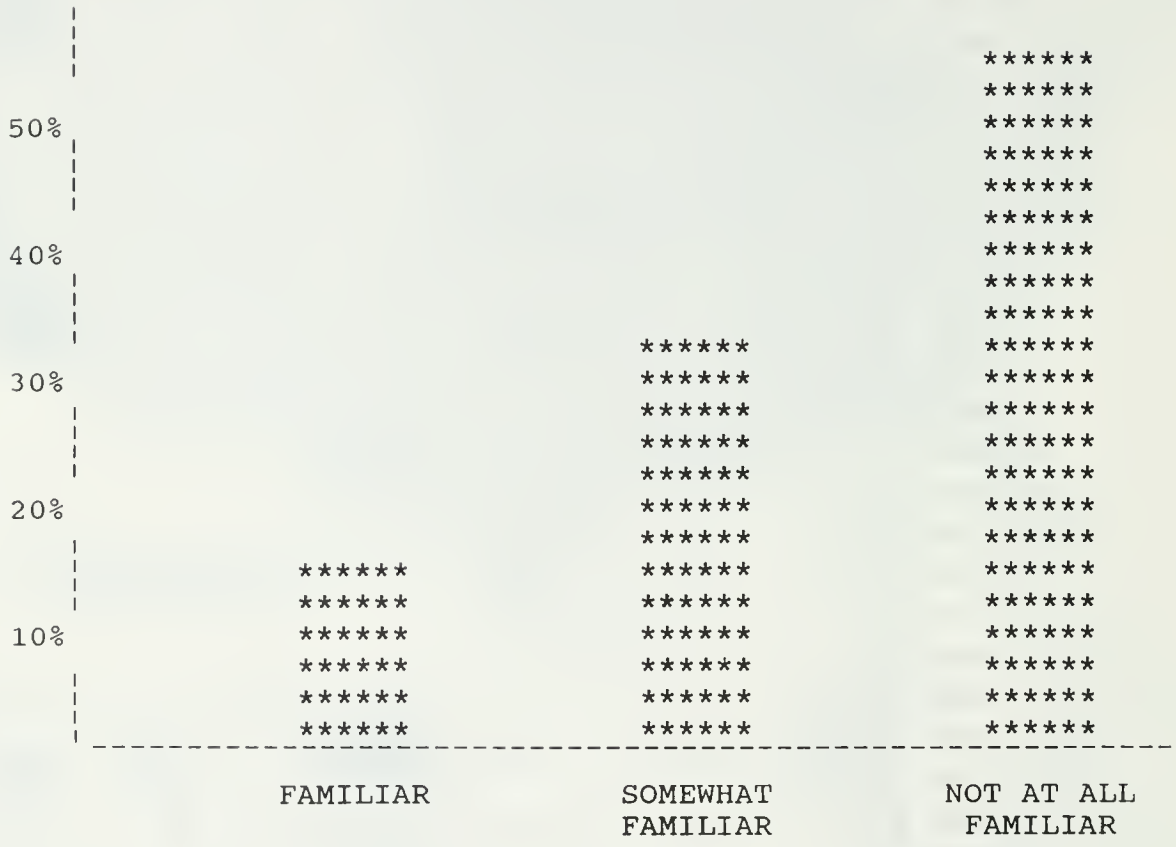
Source: Institute for Tourism and Recreation Research

Montana Vacation Travelers

Summer 1988

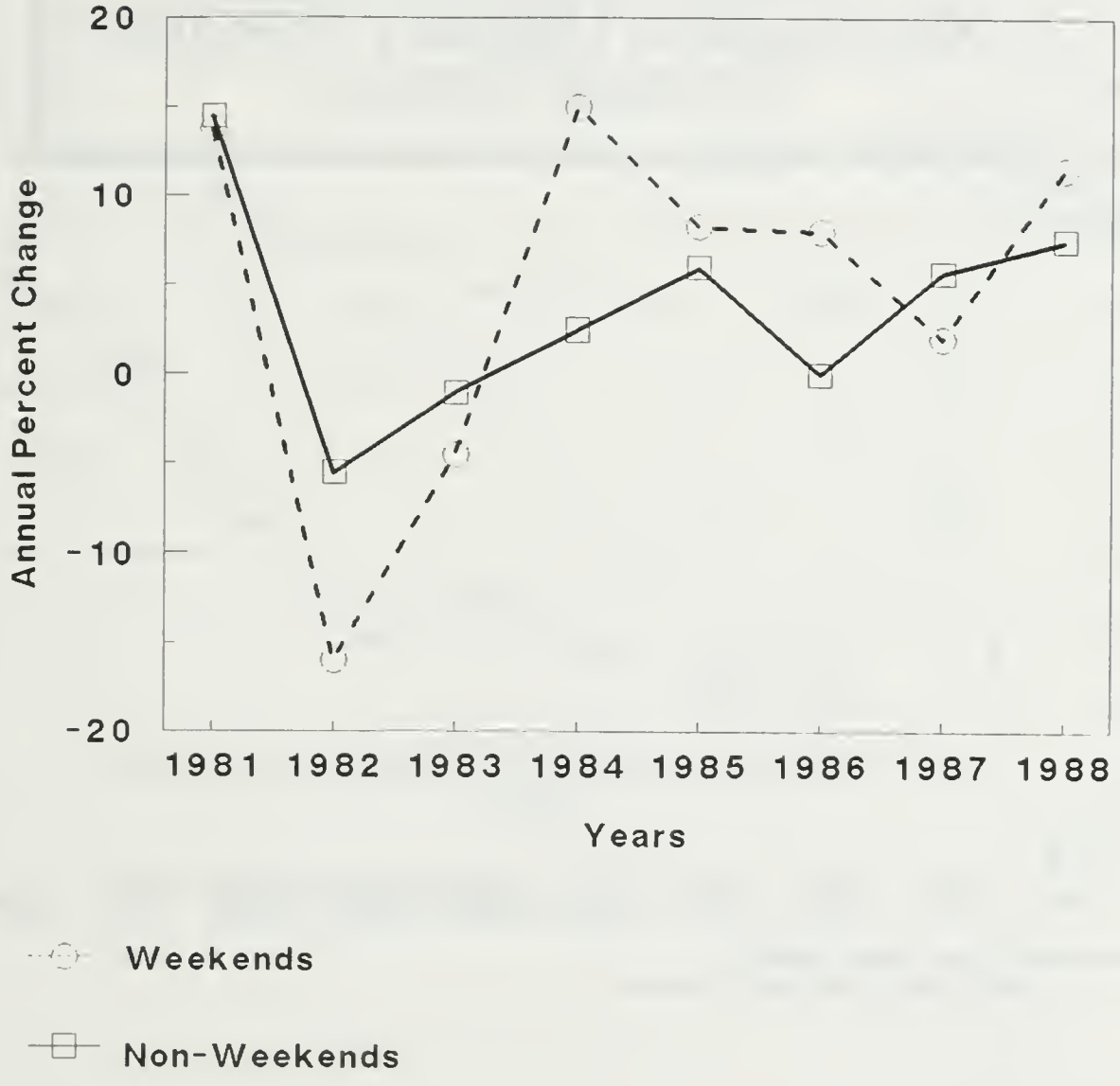


Familiarity With Montana As a Vacation Destination

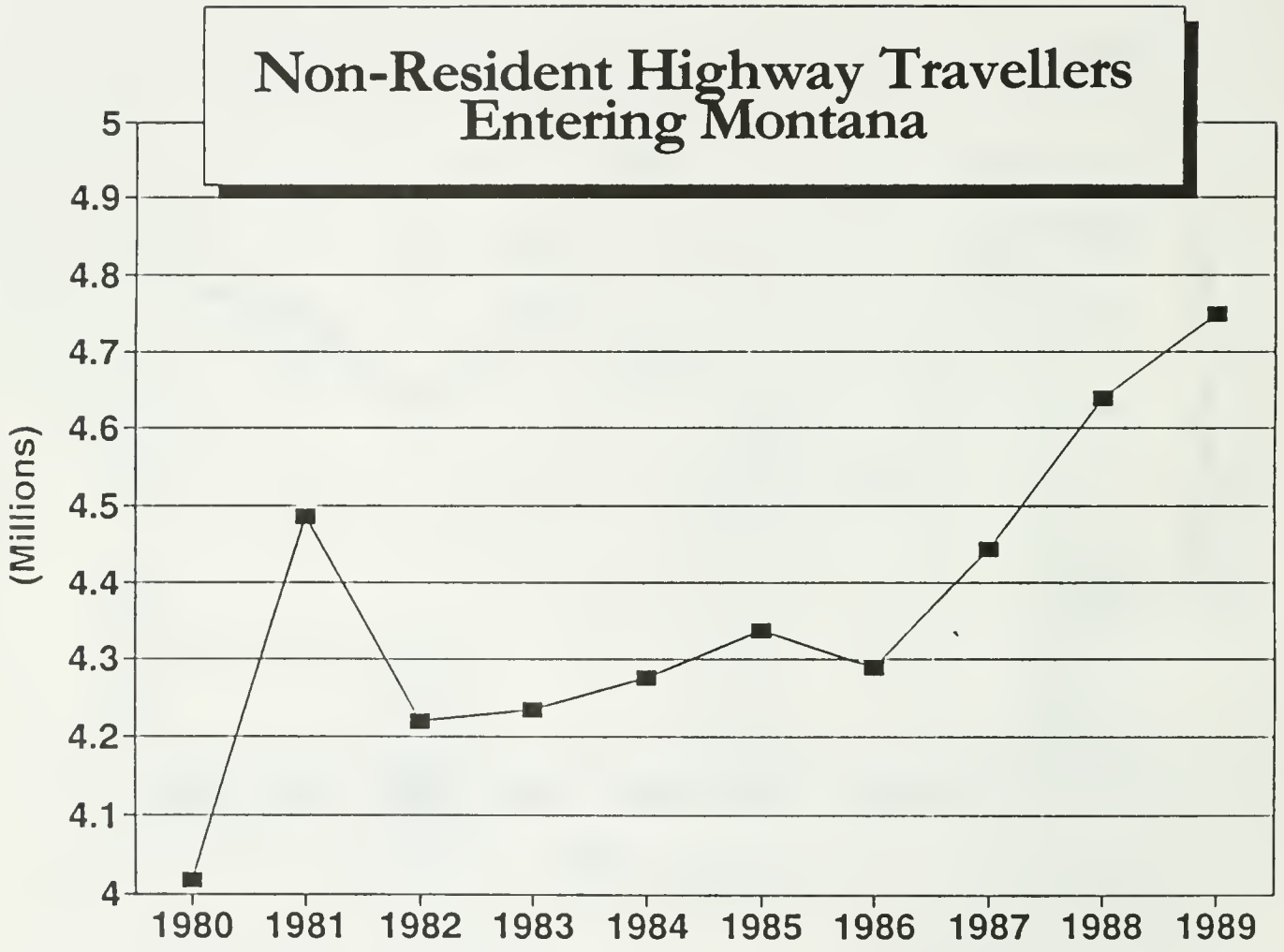


Weekend Vacation vs. Longer Vacation

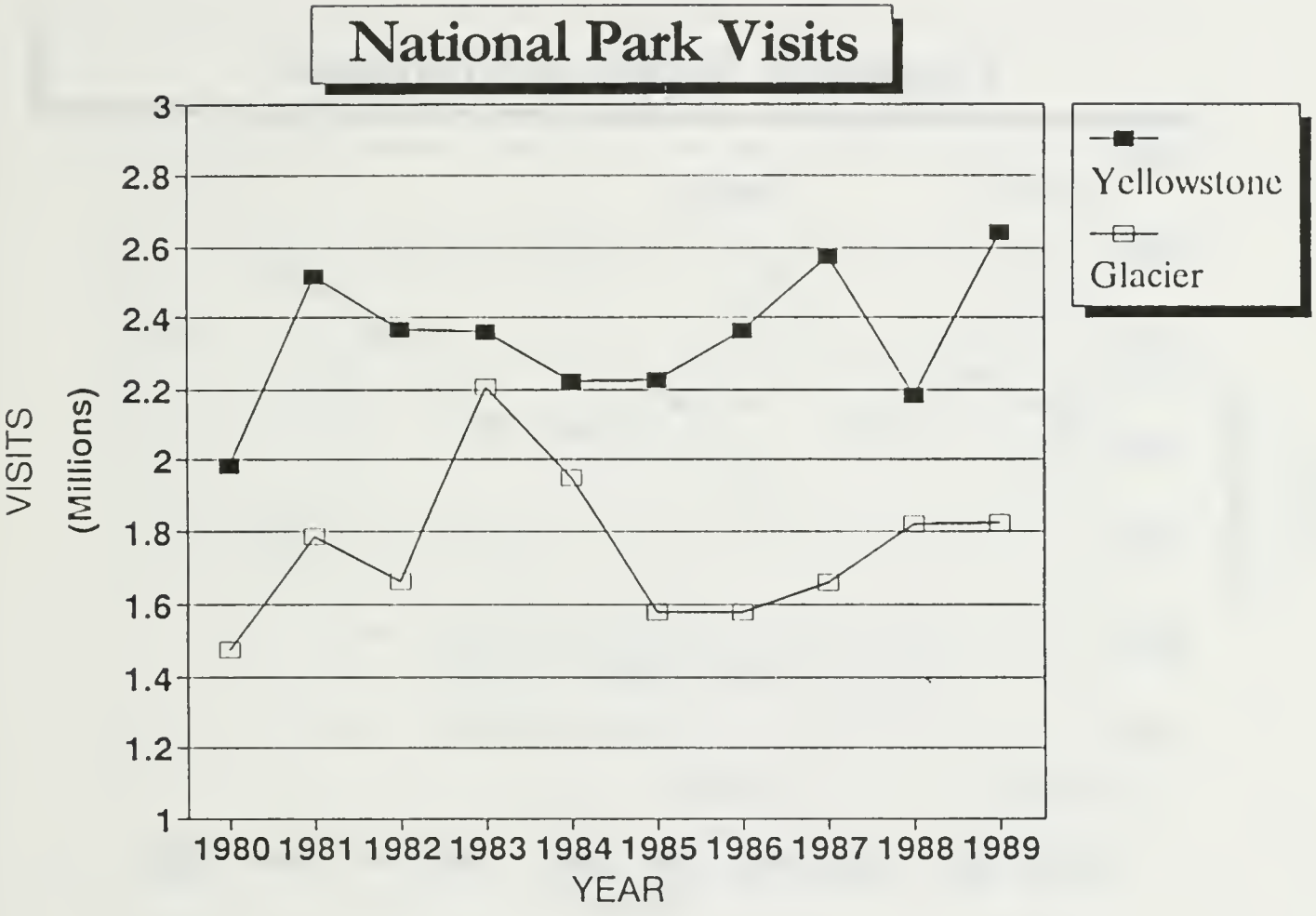
Annual Percentage Change



SOURCE: USTTA

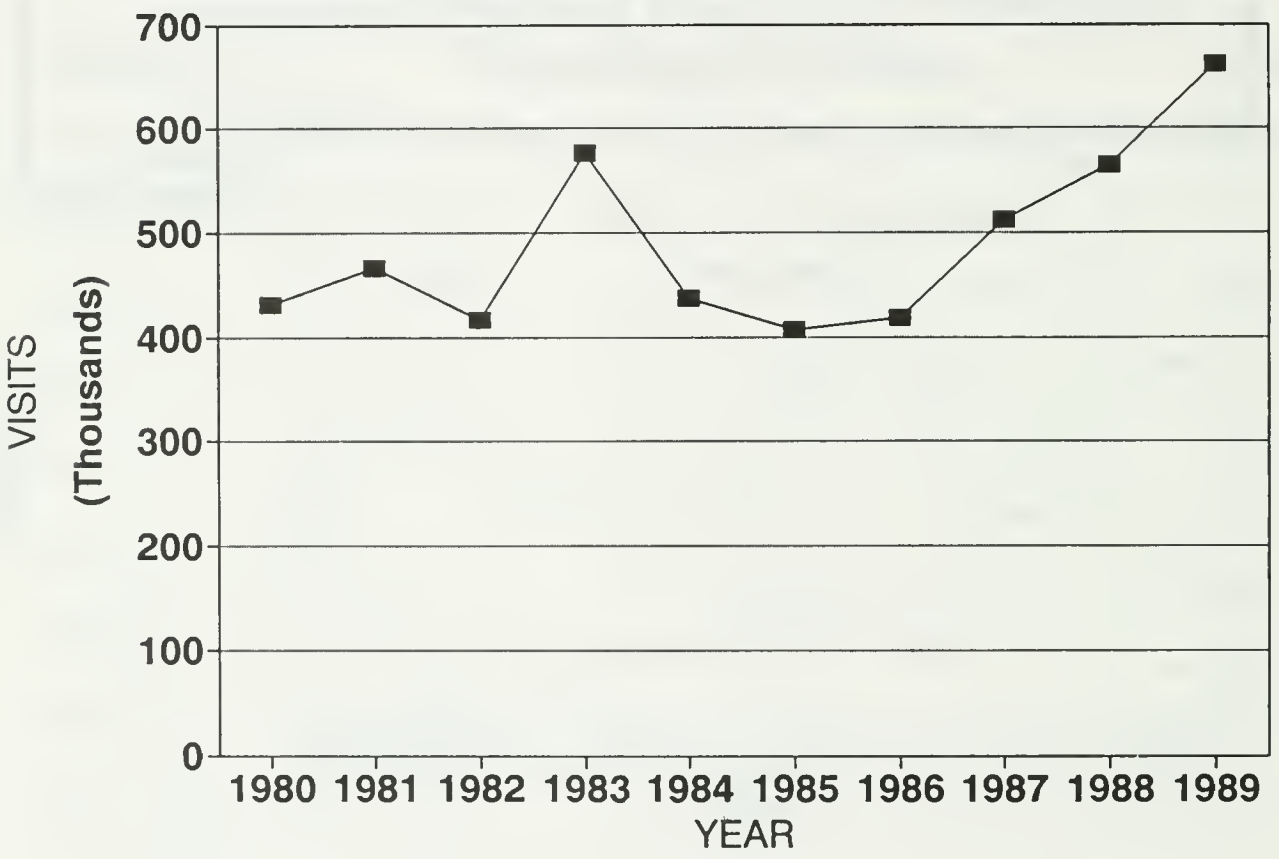


Sources: Montana Department of Highways
Institute for Tourism and Recreation Research



SOURCES: U.S. National Park Service
Institute for Tourism and Recreation Research

Canadian Visits to Montana



SOURCES: U.S. Travel and Tourism Administration, U.S. Department of Commerce
Institute for Tourism and Recreation Research

Variations by Season & Mode of Travel

AVERAGE NUMBER OF NIGHTS

	HIGHWAY	AIRPORT
SPRING	3.23	6.44
SUMMER	2.89	4.45
FALL	3.37	6.90
WINTER	5.81*	4.03

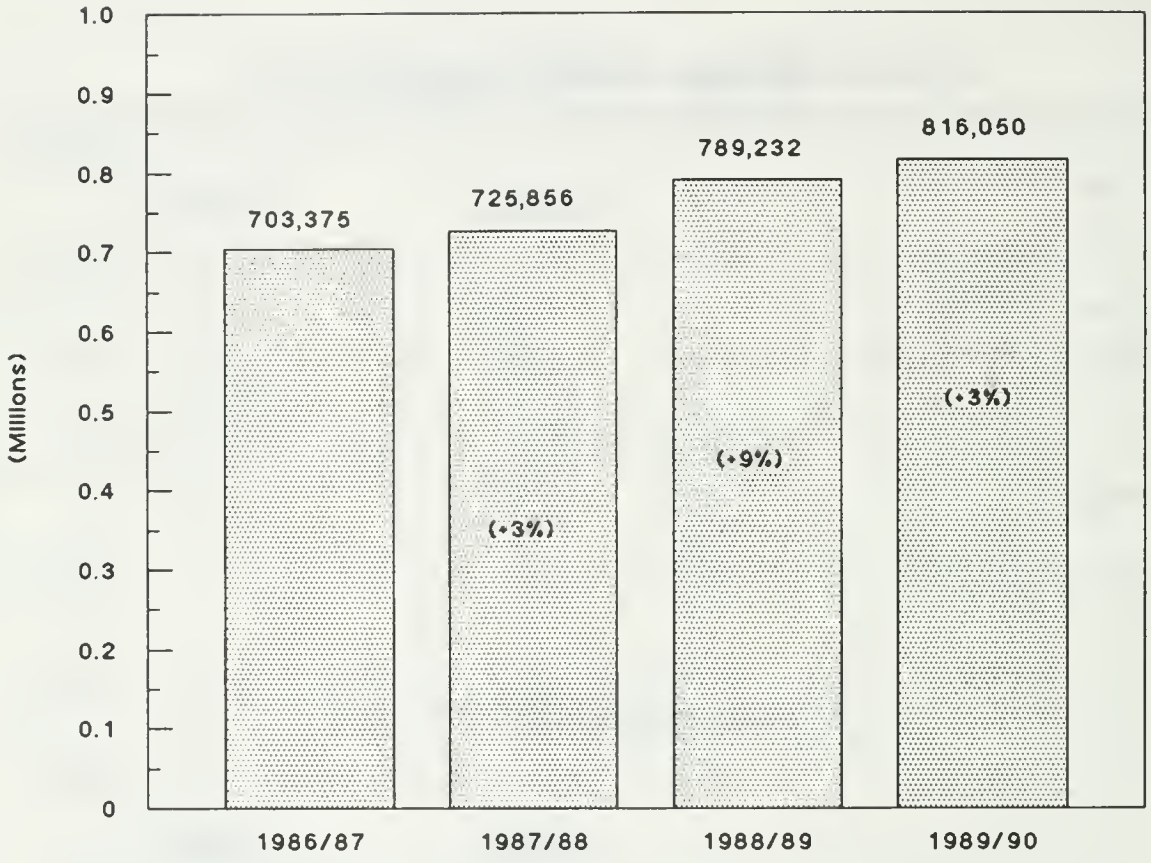
*SKIERS ONLY

TRAVEL EXPENDITURE PER PARTY

	HIGHWAY	AIRPORT
SPRING	$ 261.98	$ 472.46
SUMMER	$ 253.76	$ 621.14
FALL	$ 265.81	$ 646.16
WINTER	$1,355.87*	$ 552.37

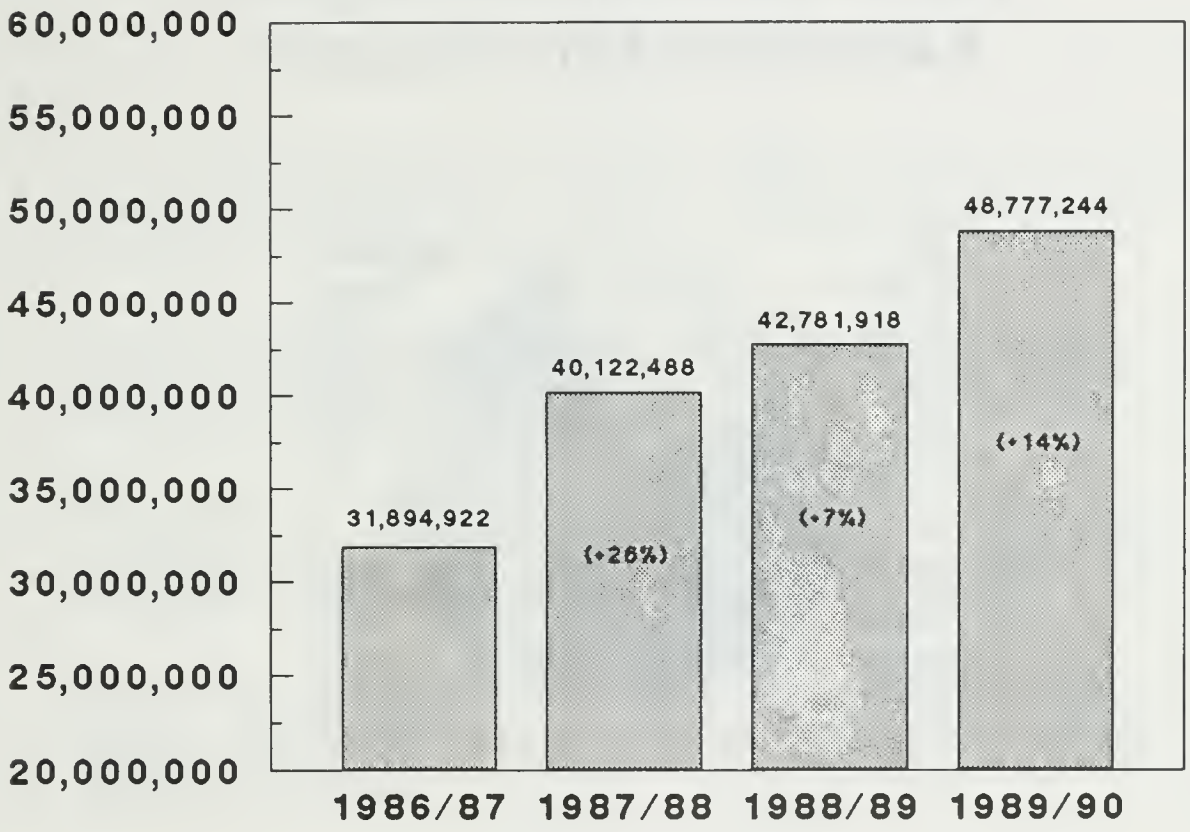
*SKIERS ONLY

Skier Days

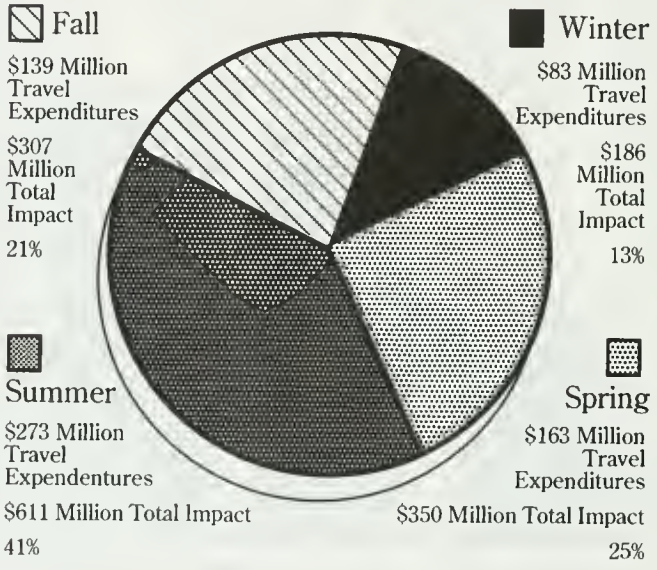


Note: Figures for 1986/87 - 1988/89 are based on information provided by the individual ski areas and do not include Beef Trail, Discovery, Great Divide, Marshall, Maverick Mountain, Turner Mountain and Wraith Hill. The combined number of skier days from these 7 areas accounted for 16% of the 1987/88 totals reported by the U.S. Forest Service. 1988/89 figures include Rocky Mountain Hi, while 1989/90 figures include Maverick Mountain.

Total Skier Revenue



Travel Expenditures and Total Economic Impact Generated by Season



Facts & Figures

1. PROXIMITY TO MONTANA IS STATISTICALLY THE MOST SIGNIFICANT VARIABLE IN ATTRACTING VISITORS.

2. OVER HALF (53.7%) OF OUR PRIME MARKET VACATION PLANNERS ARE "UNFAMILIAR" WITH MONTANA.

3. AS FAMILIARITY INCREASES, SO DOES THE CHANCE FOR VISITATION.

4. TO INCREASE VISITATION, WE MUST CREATE A VACATION IMAGE THAT IN TURN CREATES CONSUMER DEMAND. ONCE INTEREST IS GENERATED, THEN WE MUST PROVIDE POTENTIAL VISITORS WITH VACATION PLANNING INFORMATION.

5. MONTANA'S MAJOR APPEAL IS ITS SCENIC BEAUTY, CLEAN ENVIRONMENT, MOUNTAINS, NATIONAL PARKS, OUTDOOR RECREATION OPPORTUNITIES, FRIENDLY PEOPLE.

6. MOTIVATIONAL FACTORS FOR TOURISTS VARY ACCORDING TO THE REASON(S) FOR TRAVELLING AND CAN IMPACT ON THE TYPES OF ATTRACTIONS, SERVICES AND FACILITIES, TRANSPORTATION AND INFORMATIONAL SERVICES SOUGHT BY VISITORS.

7. MONTANA IS A GOOD VACATION VALUE, BUT THE COST OF GETTING HERE - BOTH IN TERMS OF TIME AND MONEY - IS A DETERRENT: MONTANA RANKS 47TH IN THE NATION IN DISTANCE FROM THE MAJOR METROPOLITAN AREAS.

8. ECONOMIC FACTORS (GAS PRICES, AIRFARES, CURRENCY EXCHANGE FLUCTUATION) INFLUENCE VISITATION.

9. THERE ARE STATISTICALLY SIGNIFICANT DEMOGRAPHIC CHARACTERISTICS OF THOSE MOST LIKELY TO VISIT MONTANA.

10. MONTANA'S MARKETS ARE NOT HOMOGENEOUS - THEY ARE SEGMENTED BY DISTANCE, INTEREST CATEGORIES AND SEASON.

11. MOST SUMMER VISITORS FIT INTO ONE OF THE FOLLOWING GROUPS: FAMILY TRAVELLERS, ADVENTURE TRAVELLERS, EMPTY NESTERS AND RV TRAVELLERS.

12. WINTER VISITORS ARE MOSTLY DESTINATION AND ACTIVITY ORIENTED. THEY ALSO TEND TO STAY LONGER AND SPEND FOUR TIMES AS MUCH AS THE AVERAGE SUMMER VISITOR.

13. REVENUES VARY GREATLY IN VARIOUS VISITOR GROUPS.

14. RECOMMENDATIONS FROM FRIENDS AND RELATIVES ARE THE MOST IMPORTANT ELEMENT IN THE CHOOSING OF VACATION DESTINATIONS.

15. ONE FOURTH OF MONTANA SUMMER VISITORS COME TO VISIT RELATIVES AND FRIENDS.

16. THE INVITE-A-FRIEND PROGRAMS ARE THE MOST COST EFFECTIVE OF THE MEASURABLE MEANS OF PROMOTING MONTANA.

17. COOPERATIVE PROMOTIONS BETWEEN MONTANA AND OTHER STATES/ PROVINCES ARE COST EFFECTIVE AND CAN INCREASE THE APPEAL OF THE VACATION PRODUCT.

18. BY BUILDING AN IMAGE FOR MONTANA AS A VACATION DESTINATION, WE ALSO POSITIVELY INFLUENCE THE MEDIA AND THE TRAVEL TRADE.

19. CONSISTENCY IS THE KEY TO IMAGE BUILDING.